DISABILITY RELATED EMPLOYMENT SUPPORTS (DRES)

CONTENTS JULY, 2005

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1.0 What is Disability Related Employment Supports?

Definition

Disability Related Employment Supports (DRES) provides supports to persons with disabilities to assist them to successfully complete Alberta Human Resources and Employment programs and services, and/or attend post-secondary institutions and accepted training programs, and/or successfully enter the workforce and maintain employment. Supports refer to services or assistive technologies designated to address a disability related barrier to education, training or employment.

DRES funds are designated to address disability related barriers, not to fund mainstream expenses or education and living costs.

For the purposes of this manual the terms "client" and "individual" will refer to the recipient of DRES funding and the term "AHRE consultant" will refer to employees of Alberta Human Resources and Employment or contracted service providers. The term "assessor" refers to a professional (medical, psychologist, etc.) requested to provide their professional opinion.

Key Principles for DRES

Inclusion

Persons with disabilities participate in society as fully as they are able.

Responsive Programming

Programming and supports are individualized, comprehensive, flexible, affordable, effective and stable. DRES follows the individual into the workforce, and outcomes reflect the individual's abilities, limitations and efforts.

Collaboration

Collaboration is encouraged between all stakeholders – individuals, educational institutions, and community agencies as well as all levels and orders of government. Employers are seen as an integral partner in identifying, developing and delivering employment supports. Programs and services are coordinated to ensure maximum effectiveness.

SELF-DETERMINATION, CHOICE AND CONFIDENCE

Persons with disabilities have the freedom to make their own decisions about lifestyle, work and community. They are given assistance in making informed choices, through the process of developing a Client Investment Plan (CIP) and increasing their knowledge of the labour market. In this way the individuals can take full ownership of their decisions

ACCOUNTABILITY

Funders and service providers are accountable to clients and the broader community, in providing fiscally and socially responsible programming. Results are measurable and monitored, to facilitate changes in client needs and improve program responsiveness.

RESPECT AND RECOGNITION

Persons with disabilities are valued as full citizens, with their rights and abilities recognized and respected, including the right to succeed and to change or modify goals.

ACCESSIBILITY

Persons with disabilities have easy access to the programs, goods and services they require to achieve integration into the workforce.

AWARENESS AND FAIRNESS

DRES addresses the barriers to employment faced by persons with disabilities and facilitates access into the same or similar AHRE and Learning programs, services and financial resources as other Albertans. Individuals will not pay more to prepare for, enter or maintain employment because of a disability.

PORTABILITY

Disability Related Employment Supports are portable across the province, as well as outside of the province.

CLARITY

The policy and procedures will be as transparent as possible and they will be promoted actively to employers, persons with disabilities and service agencies in the province. DRES will deliver clear, current and accessible information in as proactive a manner as is possible.

2.0 LEGISLATIVE AUTHORITY

Authority: *The Income and Employment Supports Act*
Income Supports, Health and Training Benefits Regulation Part 2:

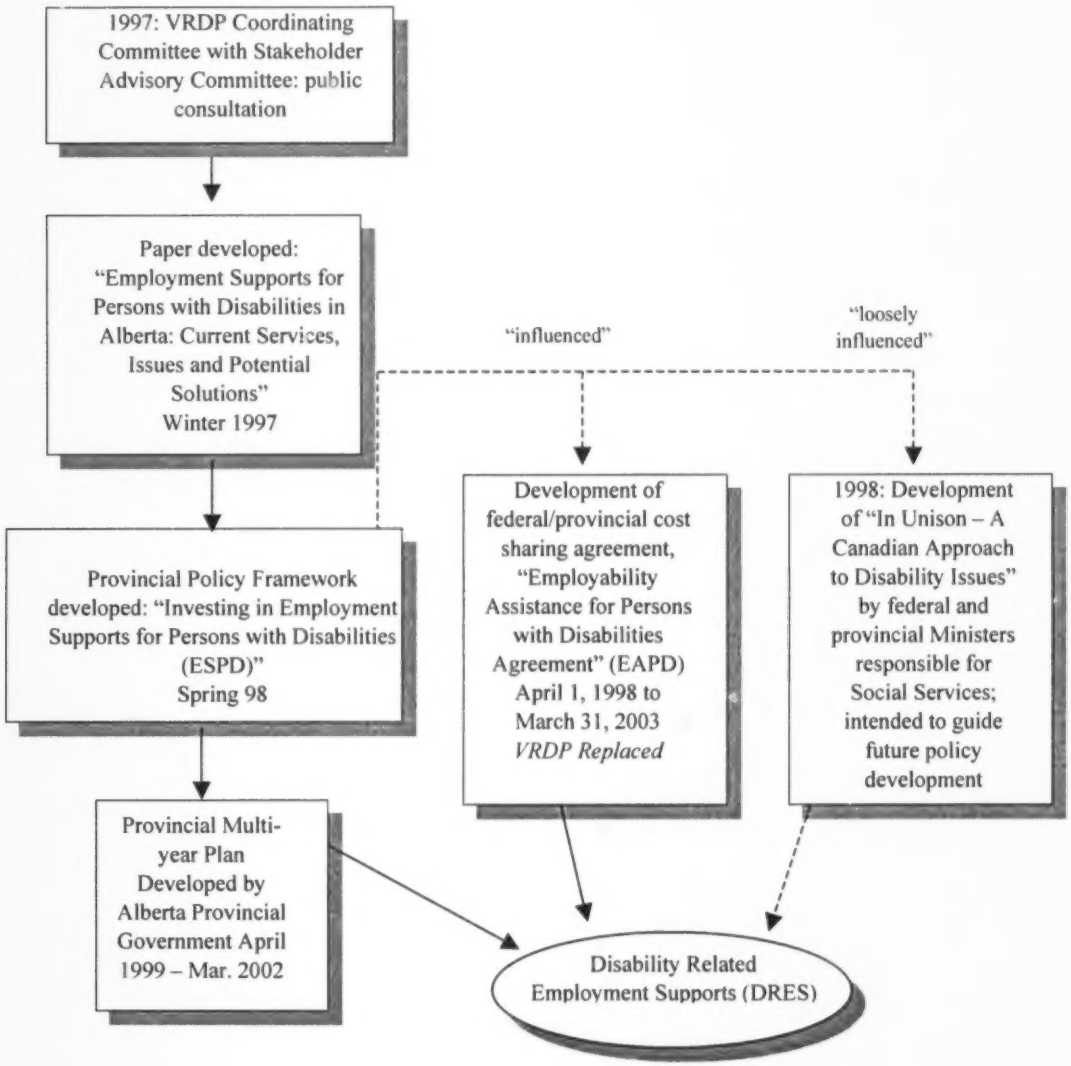
Division 5: Employment and Training Benefits for Persons with Disabilities states:

"The Director may, subject to regulations, provide employment and training benefits to eligible persons with disabilities in accordance with the regulations."

3.0 BACKGROUND

HISTORY AND BACKGROUND

A number of recent initiatives, papers and policies from both the federal and provincial governments have combined to create the environment, expectations and, to some degree, processes that DRES is operating within today. The relationship of those initiatives is illustrated below.


1997: VRDP Coordinating Committee with Stakeholder Advisory Committee: public consultation
Paper developed: "Employment Supports for Persons with Disabilities in Alberta: Current Services, Issues and Potential Solutions" Winter 1997
"influenced"
"loosely influenced"
Provincial Policy Framework developed: "Investing in Employment Supports for Persons with Disabilities (ESPD)" Spring 98
Development of federal/provincial cost sharing agreement, "Employability Assistance for Persons with Disabilities Agreement" (EAPD) April 1, 1998 to March 31, 2003 *VRDP Replaced*
1998: Development of "In Unison – A Canadian Approach to Disability Issues" by federal and provincial Ministers responsible for Social Services; intended to guide future policy development
Provincial Multi-year Plan Developed by Alberta Provincial Government April 1999 – Mar. 2002
Disability Related Employment Supports (DRES)

Note: Solid arrows indicate direct relationships, dotted arrows indicate indirect relationships.

In the present societal and political climate, there is emphasis toward integration of persons with disabilities into the mainstream of society, and insuring that their supports and rights are transferable and will follow them across the country. These are two key messages reflected in the Social Union Framework Agreement (SUFA) and the Labour Market Development Agreement for Persons with Disabilities (formerly EAPD) amongst the Federal, Provincial and Territorial governments. Disability Related Employment Supports (DRES) guidelines both respect and reflect the principles laid out in these agreements.

In following this direction, Albertans with disabilities are encouraged to access mainstream education, training and employment programs to successfully gain and maintain employment, with DRES providing facilitative services and supports where needed, to address disability related barriers.

PHILOSOPHY

The intent of DRES is to complement other programs available to Albertans by providing an individual with a disability the necessary supports to prepare for, enter and maintain his or her work choices.

DRES is an enabling and principle based program. It affords the AHRE consultant a great amount of latitude in accessing resources to address the barriers created by the disability. It also allows the AHRE consultant and the client the room to demonstrate good judgement in the discretion of how the supports should be best utilized, allocated, and authorized.

DRES provides supports and services to individuals with disabilities to help them address the barriers they may face in obtaining an education, or obtaining and maintaining employment. Deciding what is appropriate to address the barrier should be a collaborative effort including the individual, AHRE consultant, and assessor. An AHRE consultant should make every effort to help the individual find manageable solutions.

One of the essential requirements for assessing eligibility for DRES is the Client Investment Plan. This is a document that reflects the goals and action steps that an individual is planning to take. It is also an opportunity to engage the individual in the counselling process if they do not have a plan and require guidance to create one.

GOALS –EMPLOYABILITY ASSISTANCE FOR PEOPLE WITH DISABILITIES (EAPD)

Investing in Employment Supports for Persons with Disabilities: this interdepartmental policy framework outlines a set of provincial goals for the provision of individual employment programs and services and for addressing systemic barriers for Albertans with disabilities.

1. Albertans with disabilities have the skills, knowledge and attitudes necessary to prepare for employment.
2. Albertans with disabilities will find and obtain employment in accordance with their abilities.
3. Albertans with disabilities will receive appropriate supports that are effective in helping them to maintain employment.
4. Albertans will have a coordinated approach to employment supports for persons with disabilities.
5. Albertans with disabilities will have access to high quality mainstream and specialized employment related programs and services throughout their vocational plans (wherever it is practical and affordable to do so).
6. Evaluation, monitoring, and accountability systems will be in place to ensure periodic testing and reporting of results, in a systemic way among departments and jurisdictions.
7. Employers will be involved in the design and delivery of employment programs, in hiring of Albertans with disabilities and in retaining Albertans with disabilities in employment.
8. Albertans with disabilities will have the financial resources necessary to meet basic needs while preparing for employment and re-employment, gaining employment or maintaining employment.
9. Services will be delivered in practical and affordable ways and be responsive to individual differences due to disability, culture, gender and age.

4.0 Access To DRES

To access DRES, a client self-refers or is referred by a provider or community agency to an AHRE Alberta Service Centre (ASC) or Canada Alberta Service Centre (CASC). A Career and Employment Consultant (CEC), in collaboration with the client:

- Undertakes a client assessment;
- Supports the client to develop a Client Investment Plan (see definition below);
- Connects the client to AHRE programs and services, and/or post-secondary institutions and accepted training programs or an employer;
- Determines eligibility, develops or reviews the individual service plan and provides or arranges for the provision of DRES as needed;
- Provides Case Management; and
- Provides Follow-Up support.

DRES is provided upon the client's acceptance in a specific training program, during their job search or upon being hired by an employer. The provision of funding to purchase supports for a client will be based on an individual's Client Investment Plan (CIP), which outlines the specific steps and activities and estimated timelines required to obtain employment. Every one receiving DRES will have a Client Investment Plan. The AHRE consultant acts as a resource while the client prepares his or her Client Investment Plan. Some clients will need more assistance than others in identifying an employment goal and the disability related supports required.

As with any Albertan, individuals with disabilities can access mainstream Career Information Services and/or government-funded education and training programs. They will be involved in assessment, the development of a Client Investment Plan, case management and follow-up.

Client Investment Plan:

A plan in which the client identifies the educational and training goals that need to be met, and the steps to be taken in order to successfully reach those goals and enter the competitive labour market.

Case management is a component of the Client Investment Plan and all clients receiving DRES must be involved in this process. The purpose of case management is to support the client through the implementation of the Client Investment Plan and to facilitate any adjustments that may be necessary in order for the client to make the transition to sustainable work. Currently disability information, assessment factors, DRES approvals and AHRE funded training is tracked on CAIS.

For additional information on the Client Investment Plan, see the Skills Investment Accountability and Financial Management Policies. http://ahreintranet.gov.ab.ca/publications/#4

4.1 ASSESSMENT

The purpose of an assessment is to determine a client's need for employment and/or support services, including:

- Career and employment services, and/or
- Program eligibility and financial funding and/or
- Supports required to attend training, search for work, or maintain employment.

Proper client assessment is key to clients receiving the most suitable supports to assist them to achieve their employment goals.

Assessments are used to assist individuals to:

- Establish a feasible employment goal and determine the skills, knowledge and attitudes necessary to achieve it;
- Determine the skills, knowledge and attitudes necessary for the individual to maintain his or her existing employment;
- Develop a Client Investment Plan to acquire the skills, knowledge and attitudes necessary to obtain or maintain employment.

DRES Assessment

For persons with disabilities, the assessment is also used as the initial stage in identifying the disability-related supports needed to address the barrier(s) to employment. Disability-related supports include assistive technology and/or assistive services that may be required by an individual to participate in education or training leading to employment or self-employment. Funding to provide these supports may be approved under DRES.

AHRE is responsible for determining DRES eligibility and approving the amount of supports to be funded.

AHRE may enter into a contractual agreement with education, training and or service providers to provide services funded under DRES. The contract will identify the specific services to be provided for DRES clients over a specific time period for a specific fee. AHRE's standard contracting procedures apply.

A DRES assessment consists of:

- Determining the nature of the disability
- Determining the barrier(s) that the disability presents to employment, education or training
- Assessing the client according to the DRES eligibility criteria
- Determining what supports need to be put in place to address the barriers created by the disability.

The assessment process may require additional information in order to confirm the nature of the disability, identify potential supports and develop an appropriate Client Investment Plan. In such cases a referral for a Specialized Assessment may be required. (See Section 5 below)

For further information on Assessment see the Skills Investment Policy Manual - Accountability and Financial Management Policies, pages 4-13 http://ahreintranet.gov.ab.ca/publications/#4

4.2 Career Counselling

The counselling process is a key component in the development of the Client Investment Plan. Career counselling is an individualized, collaborative and client-centred process whereby some individuals may need greater assistance than others who are more independent and self-directed.

The importance of the client taking the lead role in the development of the Client Investment Plan is a key factor in achieving client commitment and accountability. Ensuring that the client has confidence in, and complete understanding of the components of the plan, it's goals and outcomes, will contribute greatly to a successful outcome for the client and subsequently the program.

Social, cultural and economic barriers, client expectations as well as the uncertainty and instability of some disabilities need to be considered in setting goals and defining success. In some cases there will be a need to revisit the Client Investment Plan and reconsider career choices. This could result in an individual trying several different paths over a period of time, as would be the case with any other Albertan.

The need for career counselling will vary across individuals accessing AHRE programs and services. For individuals who need more help in developing career and employment goals, approaches like job-shadowing and work exposure may be beneficial in confirming interests and abilities. In some cases, volunteering may be an option. In any case, there is a need for flexibility and sometimes creativity on the part of the AHRE consultant when addressing individual issues.

For additional information on Counselling, see the Career Development Services policy.

4.3 Case Management

Case management is a component of the Client Investment Plan and all clients receiving DRES must be involved in this process.

Case management provides support to an individual as she/he progresses through to the completion of the Client Investment Plan, through reviewing the individual's progress and by assisting the individual to make changes to the plan where necessary.

Case management begins when the Client Investment Plan has been prepared and agreed to by the client and the Case Manager and ends after successful provision of the supports as they relate to the plan or upon dissolution of the client/Case Manager relationship

In many situations, case management has the potential to significantly affect an individual's progress, persistence and ultimate success in achieving their employment and training goals.

See the Skills Investment Accountability and Financial Management Policy - Assessment and Case Management for additional information on Case Management
http://ahreintranet.gov.ab.ca/publications/#4

4.4 Follow–Up

Follow up of clients is done based on the program, service or supports the client receives. For persons who are in AHRE funded training programs, case management activities are tracked on CAIS.

All clients receiving DRES must be followed up and outcomes captured in CAIS.

Follow-up is required 90 and 180 days after the completion of the support provided:

- To determine employment status,
- To determine if the support is still being used,
- To determine if the support was effective in addressing the barrier.

Follow up is used to ascertain whether an individual is employed/maintaining employment and to verify the satisfaction level with the support received from AHRE. Follow up also allows the AHRE consultant to identify a need for additional intervention in order to avert possible job crisis.

4.5 DRES Accountability Measures

The following criteria will be used to measure success for all clients who receive DRES. Reporting on these accountability measures will be done through CAIS. Case management and follow up is mandatory for all clients who receive DRES. Outcomes should be entered in the Comments section of the DRES.

- Number of people who have been approved for disability related employment supports
- Number of participants successfully completing their Client Investment Plan
- Number of people employed who received: Education Supports, Workplace Supports or Job-Search Supports

- Number of participants satisfied the employment supports were effective in addressing the barrier (obtained through WORP)
- Number of individuals who did not complete their Client Investment plan.

The expected outcomes of DRES are:

- Employment
- Job maintenance (when DRES is used for crisis intervention)
- Reduction of employment barriers for people with disabilities.

Specifically, it is expected that the following performance measures will be used by AHRE to assess the success of DRES:

- At least 70% of DRES clients successfully achieve the employment goal established in their Client Investment Plan; and
- 85% of the clients are satisfied with DRES.

5.0 SPECIALIZED ASSESSMENT

5.1 SPECIALIZED CLIENT ASSESSMENTS

The Specialized Client Assessments are undertaken within the context of AHRE's employability assessment. The purpose of an employability assessment (performed by a Career and Employment AHRE consultant or a training provider) is to determine if a client is labour market destined and, if so, determine whether training is required in order for the client to enter and remain in the labour market. A Specialized Client Assessment may be indicated by specific factors identified within the employability assessment, such as physical health, literacy, psychological barriers and/or learning difficulties. This assessment is used to identify the barriers to employment or training presented by the disability and to identify the types of support required by the individual, such as assistive technology (e.g. voice-recognition software) and/or assistive services (e.g. academic strategist) to enable the client to participate in employment or training leading to employment.

Career and Employment Assistance Services (CEAS) should be used to fund Specialized Assessments and all related costs (see Section on Payment Procedures).

Specialized Assessment Process

- Conduct initial interview(s) with the client.
- Confirm that there is permission and approval from the client regarding follow through with the development of the Client Investment Plan.
- Confirm the client can benefit from education or labour market training to obtain work.
- Use information from previous assessments where applicable, and determine whether additional information from a Specialized Assessment is needed.
- Confirm that the client requires and can benefit from a Specialized Assessment, through consultation with colleagues, and with one or more of the Specialized Assessment providers.

a) What is a Specialized Assessment?

A Specialized Assessment is a more "in depth" analysis of a client's educational, vocational, medical, intellectual, or psychological capabilities. It is conducted by persons certified to confirm the nature of the disability and to make recommendations for accommodations or supports required by the client to enable them to participate in education or labour market training programs and to obtain and maintain employment.

A Specialized Assessment identifies additional information required to enable a AHRE consultant to complete an employability assessment and develop a Client Investment Plan with the client in order for the client to make a successful transition to the workplace. Specialized Assessments should recommend strategies and approaches that are responsive to individual needs, and that will help clients succeed in education and employment.

Specialized assessment services should not be used to determine whether clients are expected to work, or not expected to work, to determine AISH, CPP, PDD eligibility, or to confirm information that already indicates that clients have little if any potential for gainful employment. In these cases, AHRE consultants would help clients develop an action plan that directs them to services more appropriate to their needs.

b) What is the intent of Specialized Assessment?

The intent of Specialized Assessment is:

- To assess, or confirm the presence of a suspected disability(s) that may affect career, skills development and employment choices and need
- To identify individual strengths and disability related limitations that may affect career choice, skills development methods, and employment outcomes and performance
- To provide documentation (where required) for a CEC to review DRES and DSG eligibility and potential supports.

All existing information relevant to the client investment planning process that is available on the client should be reviewed prior to referring a client for a Specialized Assessment.

c) When is a referral to Specialized Assessment services indicated?

Specialized Assessment services may be required for clients who demonstrate two or more of the following:

- A sporadic work history, with significant difficulty in obtaining and maintaining employment
- A history of not completing upgrading or training programs
- Prior assessments and referrals that have not helped them experience success
- Prior participation in education or labour market training programs with little success
- Previous interventions which were unsuccessful but the reasons are unclear
- Low literacy or numeracy levels (grade 7 or less)
- Physical, medical, or psychological conditions which the AHRE consultant and/or client feel may affect success
- Personal or family problems that appear to have impeded the client's ability to succeed in training or the work force over time
- Frustration or difficulty expressed by the client in social, employment or training settings

- A stated disability
- Ineligibility for Assured Income for the Severely Handicapped (AISH) as the disability does not preclude employment
- Inconsistent or conflicting information from a doctor and/or client.
- A suspected undiagnosed or misdiagnosed mental health, cognitive or learning disorder.
- Multiple issues where a Specialized Assessment is expected to identify a realistic vocational plan beyond what the CEC can ascertain from their own assessment.
- The assessment cannot be obtained through other sources, e.g. Health or Justice.
- Others, as determined by the AHRE consultant.

A Specialized Assessment will be used to facilitate a decision on the appropriateness of providing DRES. It will help to determine:

- What restrictions, if any, there will be on preparing for, obtaining and maintaining employment?
- What supports or modifications will be needed?
- What specific strategies will assist the individual to develop an appropriate Client Investment Plan?

A new assessment may be required if the most recent assessment is more than 5 years old and if there has been significant changes in the original diagnosis of the permanent disability, or if technologies and strategies have significantly changed in the interim.

Note: Individuals referred to a specialized assessment need to be work destined.

d) What types of Specialized Assessments can typically be provided for clients?

EDUCATIONAL

To determine the basic education level, learning difficulties or learning disabilities, preferred learning styles or strategies (see Learning Disabilities below). Educational psychologists frequently complete these types of assessments.

FUNCTIONAL

To determine physical ability to perform a variety of work-related tasks, for example manual dexterity. Physiotherapists or Occupational therapists often complete these types of assessments.

VOCATIONAL

To determine, through job tryouts or other means, what elements of a job can be completed. These are often completed by Occupational Therapists.

Please Note: It is not recommended to refer clients for assessment of aptitudes, interests and transferable skills, as these types of assessment can be obtained through the services provided in contracted workshops or at Delivery Centres.

MEDICAL

To obtain a current report on health conditions and disability completed by a medical professional.

PSYCHOLOGICAL

To determine the state of mental health, and the ability to function in social, training and workplace contexts. A medical professional or a clinical psychologist may complete these.

Psychological/Psycho-social/Personality assessments are useful for individuals suspected of:

- Anxiety Disorders, including panic attacks
- Depression
- Personality Disorders
- Behavioural Problems
- Other Emotional Problems

Psychological assessments are not the same as psychiatric evaluations, and are not intended to diagnose deep psychiatric disorders. Various psychological assessments, such as the Personality Assessment Inventory, can be administered to provide information about an individual's current state of mental/emotional health and their ability to function in and cope with the demands of education/training, employment, or daily life.

Psycho-Educational provide information related to intelligence, achievement, behaviour and learning. These assessments use standardized test batteries and usually address educational or intellectual capabilities as well as psychological functioning that will likely impact success in work or training. A basic neuropsychological screen for more complex brain dysfunction may also be part of the assessment. This testing is important as a screening tool to detect more complex problems that may require additional or more in-depth assessment. The selection of tests and interpretation depends on the skill and expertise of the examiner, but psychologists are required to adhere to the standards of practice identified by the College of Alberta Psychologists.

Psycho-educational assessments are useful for identifying:

- Intellectual Capabilities

- Giftedness
- Learning Disorders (math, reading, spelling)
- Intellectual Deficiencies
- School Readiness

These assessments may involve:

- Intelligence tests evaluating intellectual functioning and problem-solving capabilities
- Neuropsychological screens to identify potential brain function problems, memory, processing efficiency, etc.
- Academic achievement tests to identify appropriateness and readiness for training
- Eye-hand coordination and dexterity tests

Learning Disorders, Attention Deficit Disorder and Attention Deficit/ Hyperactivity Disorder

Learning Disorders (LD), Attention Deficit Disorder (ADD) and Attention Deficit / Hyperactivity Disorder (ADHD) are all considered neurologically-based disorders, permanent in nature. Learning disabilities affect HOW the person processes information, while ADD/ADHD affects WHEN the person is available to process the information – that is, the individual is not able to attend to the information at the time it is presented. ADHD may be associated with a Learning Disability.

People with Learning Disorders may require accommodations or assistive technologies to attend educational institutions, whereas people with ADHD may require medical attention, but may not require any additional accommodations.

An assessment by a psychiatrist, a registered psychologist with ADD/ADHD training, neuro-psychologist, or relevantly trained medical doctor is required to differentiate the diagnosis and the impact of the disability on learning. In order to determine supports, **if any,** necessary for a student with ADD/ADHD to pursue post-secondary education or training, a psychological assessment may be beneficial.

NEURO-PSYCHOLOGICAL

A neuro-psychological assessment is designed to assess the change in brain function when brain damage occurs due to injury, stroke or a medical condition.

Neuropsychological assessments may be useful for evaluating the following suspected disorders:

- Attention and Concentration Disorders
- Brain Injury or dysfunction
- Brain Tumours
- Head Injury

- Complex Learning Disabilities (Dyslexia, Dyspraxia, Dysgraphia)
- Conduct and Oppositional Disorders
- Cognitive Processing Disorders
- Dementia
- Impulse Control Disorders
- Memory Disorders
- Organic vs. Functional Disorders
- Perceptual Disorders (visual, auditory)
- Psychiatric, Psychotic and Mood Disorders
- Psychopathology
- Seizure Disorders
- Speech and Language Disabilities
- Stroke/CVA/Aneurysms
- Substance Induced Disorders/Alcohol and Drug Abuse
- Suspected Neurological Impairment

Neuropsychological assessments are used when it is important to identify the nature, basis and degree of an individual's deficits and strengths. Arriving at a working diagnosis may be necessary when proof of a disability (documented disability) is required. This can be a complex task when brain impairment or dysfunction is suspected. Having a clear diagnosis is essential for developing appropriate action plans, rehabilitation or supports required in line with the individual needs of the client.

Neuropsychological assessments differ from conventional psychological evaluations in that they involve the use of a very comprehensive battery of assessment tools specifically designed to systematically assess most of the major neurofunctional abilities. An adequate neuropsychological evaluation will go beyond a simple determination of the client's intelligence or academic level that is frequently the focus of standard psychological assessment procedures. It will make inferences about the presence or absence of brain dysfunction, identify significant strengths and weaknesses of the client and make recommendations that will assist in treatment, goal selection and planning, determining employability status, and/or identifying modifications which need to be made to a learning, work or daily living environment.

SPEECH AND/OR LANGUAGE

To determine conditions that will affect communication within social, educational, training, or workplace environments. Speech therapists may complete these assessments.

Qualified individuals who can do Specialized Assessments include, but are not limited to: Medical Specialists, Vocational Rehabilitation Experts, Occupational Therapists, Physical Therapists, Vocational Evaluators, Audiologists, Ophthalmologists, Speech and Language Therapists or Psychologists. The choice of professional will be dependent on the desired information.

e) Who will determine how Specialized Assessment services will be made available?

- AHRE Service Delivery Regions, in consultation with partners and other deliverers, will determine the type and level of Specialized Assessment services that will be used.
- A Region may decide to develop a resource list or establish contracts with assessors to refer clients when required.
- Expectations need to be laid out in the referral process as to the type of services and reporting that is required, including identification of the supports required by the client to enable them to take training or perform on the job, as well as the fees to be paid for each type of assessment.
- When developing a resource list or establishing contracts for specialized services, the following factors need to be taken into consideration:
  - Type of Specialized Assessment that can be provided
  - Relevant testing and assessment experience with target client group
  - Professional qualifications of the provider
  - Professional certification and standing within their professional association
  - References
  - Ability to provide services in a timely manner and to send a report within a specified time of completing the assessment.

See Contract Management Policies and Procedures Manual
http://ahreintranet.gov.ab.ca/publications/#4

f) Arranging Specialized Assessments

Initiating the Referral

Potential clients may be indentified by:

- The AHRE consultant, as part of the career counselling process with a person who is employment or training bound.
- The Centre for Students with Disabilities at the school the student is attending or planning to attend may refer the client to AHRE to determine if an assessment is appropriate.
- The client and/or other service provider/agency working with the client may refer the client to AHRE to determine if an assessment is appropriate.

Collecting Background Information

- Obtain and review all related documentation from the client that supports the potential need for a specialized assessment.
- Ensure the client signs Consent for the Disclosure of Personal Information (AHRE 3043) for each person or body from whom you are going to collect background information (e.g. school records, hospital records, previous assessment reports.)
- Send cover letters and corresponding signed Consent forms to the various places from which you are requesting information.

Selecting the Assessor

- In consultation with the client, select a contractor from the most current contractor/resource list.
- Contact the assessor that the AHRE consultant and the client have agreed as being the best suited to conduct the assessment. Confirm with the assessor that they can conduct the requested assessment. The AHRE consultant may request a particular assessor or the contractor may assign a qualified assessor. Arrange for a date for the assessment and, if possible, for the case conference – the meeting of the assessor, client and the AHRE consultant to discuss the results of the assessment.
- The service must be provided within a designated time frame

Preparing Referral Package for Assessor

- Complete and send to the assessor:
  - Specialized Assessment Referral Form or letter
  - Type of information required from the assessment. The AHRE consultant must state exactly what questions they expect the assessment to answer, including recommendations for specific supports as well as recommendations related to a reduced course load if attending training.
  - Cover letter with a description of services to be provided and a request for an estimate of the cost
  - Previous testing and assessments done
  - Relevant medical reports
  - Other background information relevant to the assessment
  - A request to the Specialized Assessor to confirm in writing the type of service that will be provided, number of service hours, and cost.

Preparing the Client

- Inform the client about the length of time required for the testing and whether or not they will need to bring lunch, arrange child care or after school care.
- Advise the client what to expect during the assessment and during the Case Conference.
- Ensure the client is clear about the date for the testing and what to do in the event of unforeseen circumstances necessitating a rescheduling of the appointment or case conference.
- Review the purpose for the assessment and case conference with the client, and discuss activities that will occur after the case conference.
- Ensure that the client understands and is comfortable with how FOIPP protects their privacy.
- Ensure that the client is aware AHRE will get a copy of the report.

AHRE consultants and contracted service providers, where applicable, must ensure that:

- The results of Specialized Assessment are conveyed to both AHRE and the client in a report that is readily understood.
- A case conference is held with the Specialized Assessor, AHRE and the client to review the results and establish how to interpret and apply the information in the best interests of the client.
- This information is used to help the client determine what strategies and approaches will need to be included in the Client Investment Plan and subsequent programming to address their needs and support their transition to employment.

The Case Conference

- If a date was not determined at the time of the referral, ensure there is a mutually convenient date scheduled for the case conference. Confirm the date, time, location and expected duration with the client and other key players.
- Confirm who will be attending the case conference.
- Ideally, the AHRE consultant should assume the lead role in the case conference allowing the assessor to concentrate on debriefing the test results.

Services Provided by Contracted Assessors

Services may range from a simple file review to an intensive testing service.

- The elements of a testing service include:
  - Clinical interview
  - Assessment testing and interpretation
  - Written report

- Case conference
- Client report
- Follow-up consultation

- The average timeframe for a client file review completion is 2-weeks.
- The average timeframe for a full service is 8-weeks from the date of referral (i.e. the date the assessment appointment is booked) to the date on which the written report is received. The case conference should also be held within this 8-week time period – either prior to or at the time of submission of the written report.
- The Contractor can make a request for an extension of the time frames, when, for example, a client cancels an appointment, or an AHRE consultant is ill, or additional testing is required (in the latter case, the assessor must first confer with the AHRE consultant).
- Follow-up Consultation - during the 6-month period from when the assessment has been conducted, the AHRE consultant or the client may contact the assessor by email or by telephone to clarify test results or to question the application of the test results in a particular education or training context.
- The assessor will review the original data in light of any new information and provide new or revised recommendations where appropriate.

Monitoring and Verification:

- The service provider invoices AHRE for completed services.
- Prior to authorization of payment, AHRE verifies services have been provided and are complete. CAIS must be updated for each client. If CAIS does not confirm that services have been delivered and are complete, payment cannot be authorized.

For further information regarding the contracting processes, see the Contract Management Policies and Procedures Manual. http://ahreintranet.gov.ab.ca/publications/#4

Client Follow-Up to Assessment

- The assessment should always result in further planning with the client. The AHRE consultant and the client arrange to meet to discuss next steps. This could mean continuing with the original Client Investment Plan or it could mean developing a new CIP.
- The assessor will have made recommendations in the assessment. Recommendations may include specific learning supports. AHRE is the final decision-maker and must authorize all services to be provided, equipment to be ordered and/or training provided to use the specialized equipment or software.
- The AHRE consultant is responsible for determining if recommendations meet DRES guidelines.

- When DRES is required, the AHRE consultant will commence a DRES application.

CAIS Input

A referral to a Specialized Assessment is entered on the OTHER (OTH) screen as an SA. The following information **must** be entered into CAIS, in the Comments section:

- Date AHRE consultant booked the assessment or faxed over the documents for review
- The name of the assessor, or contractor, who is going to provide services
- The date of the assessment
- Type of assessment conducted
- The date the case conference was held
- Confirmation AHRE consultant attended case conference
- Confirmation final report received

NOTE: Document if client was referred but did not attend the assessment.

g) **How are Specialized Assessment services paid for?**

Specialized Assessment services and all related costs (travel etc.) are paid for through CEAS:

- AHRE may establish a Resource List for contracted services with agencies or individuals.
- AHRE consultants will refer clients to Specialized Assessment services as needed, and will forward monthly a list of clients referred to Specialized Assessment services to the appropriate contract manager for invoice verification purposes (as noted in AHRE contracting policy).

For further information regarding the contracting processes, see the Contract Management Policies and Procedures Manual. http://ahreintranet.gov.ab.ca/publications/#4

5.2 Assistive Technology Assessment

For all disabilities the assessment process involves:

- Identifying the functional limitations
- Analyzing the tasks to be performed while training or on the job
- Determining the needs of the client based on the disability and the demands of the training program or job.

In many cases, matching the requirements for technical supports with what is available goes beyond the knowledge of both the client and the AHRE consultant.

It is therefore recommended that independent resources be accessed wherever possible for the assessment of technology requirements. This will help ensure that the client receives the best possible technical support. As well, it gives the client a stronger sense of confidence in the decision, and the AHRE consultant assurance that the solution is the most cost effective for DRES.

Post secondary institutions will commonly offer an assistive technology assessment service. The client may be able to help with information about who the local resources are, or suppliers may be able to provide information that will help in selecting an appropriate assessor.

If there is perceived to be a conflict of interest in the technology assessment process, it is recommended that another recognized assessor review the assessment.

For contracted services to provide technical assessments, see Section 5.2 above for procedures related to contracting, as well as the Contract Management Policies and Procedures Manual. http://ahreintranet.gov.ab.ca/publications/#4

The Conditions for Assessors

Once selected, providers of assistive technology services will provide services that meet the conditions below.

Assessors of assistive technology are required to:

1. Complete a comprehensive assessment for each individual referred according to the process and forms developed by AHRE.
2. Explore a range of devices on the market to determine the most appropriate set-up for each individual based on the anticipated need over the length of training.
3. Provide the AHRE consultant with a detailed specification sheet defining the assistive device(s) required and when they should be provided.
4. Seek the most suitable suppliers for the required assistive technology.
5. Identify suppliers who can integrate the devices where necessary, set up the technology and train the person with the disability.
6. May arrange for training in the use of software where specialized expertise is required.

When the above steps have occurred, the AHRE consultant will:

1. Review the specification sheet
2. Compare assessments from competitive assessors OR
3. Have the assessment reviewed by an agency or organization proficient in the specific technological field
4. Obtain a minimum of two estimates on the cost of the assistive technology

5. Have the delegated authority authorize the purchase based on the assessors' specifications.

Timely Service Provision

To ensure that individuals are able to fully benefit from training and employment opportunities, assistive technology needs to be provided in a timely manner. For those in the post-secondary system it means that the technology is required when studies begin. That may mean that earlier provision of the service is required so that the individual is trained in its use when classes commence.

The client and assessor have a shared responsibility to ensure that assistive technology is provided in a timely manner. There will be times when availability and delivery of products will make this process difficult to expedite. In order to ensure that the delays are not as a result of the ***process***, the following needs to be noted:

- Wherever possible, the individual must apply for the assistive technology early enough for an assessment to be completed and the technology supplied.
- All of the information required to make a decision about appropriate assistive technology must be provided to the assessor so that the assessment is complete.
- The Client Investment Plan must be far enough advanced so that the nature of the training or employment can be considered in the assessment process and then integrated into the Plan.
- In some instances the client will require time to learn to use the assistive technology before it can be used in a training or employment situation.

For individuals receiving Workplace Supports, timing is particularly crucial. If assistive technology is needed for skill training, training-on-the-job or employment, the individual must have it and be able to use it in accordance with the employers' (or trainers') timelines. If this does not occur, employment opportunities could be missed and employer relations strained. This will particularly be an issue if the individual cannot receive a timely decision on the request for assistive technology. In some instances customized systems need to be constructed and this can be time consuming. Therefore, it is critical that the need for assistive technology be identified very early in the career consulting process.

5.3 Resources for Referrals to Specialized Assessors

There may be a number of resources in the community who can provide the Specialized Assessment services that clients may require in order to identify the appropriate programs, services and support for them.

The list of practitioners includes but is not limited to:

- Occupational therapists

- Physiotherapists
- Psychologists
- Vocational evaluators
- Rehabilitation Counsellors
- Speech or Language Pathologists

Organizations such as Alberta Mental Health, the Canadian National Institute for the Blind (CNIB), the Deaf and Hard of Hearing Society, Canadian Paraplegic Association, local colleges and universities are sources of names of specialists who may provide Specialized Assessment services.

It is a Regional decision as to how the Specialized Assessment services are coordinated and how budgets are allocated to these services. A Region may decide to use contracts or fee for services or a combination of the two for Specialized Assessment services. Regions may choose to develop a resource list of practitioners in the community who can provide the necessary services. A Request for Qualifications can be used to develop such a resource list.

Factors to consider in selecting a Specialized Assessment service provider to do an assessment include:

- Match between assessment need and specialist
- Client match and choice
- Match between need and nature of the disability, and resources available
- Timeliness
- Rotating the resources used instead of relying on a select few
- Consideration of quality, relevance and clarity of previous assessments from the assessor

6.0 ELIGIBILITY

6.1 MANDATORY ELIGIBILITY CRITERIA

DRES policy is designed to enable persons with disabilities to access and achieve success in both mainstream and specialized programs of education, training and employment.

In order to access DRES, a client must meet the following criteria to be eligible:

- Be 18 years of age or older;
- Have a documented permanent or long term disability and require disability-related supports to address barriers to the completion of his or her employment goal;
- Be a resident of Alberta (have an Alberta address);
- Meet citizenship requirements (e.g. Canadian citizen, permanent resident, or convention refugee) and be legally entitled to work and train in Canada, and
- Is work destined in the competitive labour market and has completed a Client Investment Plan.

What is Competitive Employment?

- Working in paid employment for at least minimum wage (the number of hours worked will vary, dependent on the individual needs of the client and collaboratively worked out amongst the client, the employer and the AHRE consultant) and
- Working in an employer/employee relationship, subject to the Employment and Labour Standards Code, in which the client receives all applicable funding and protection as an employee, or
- Self-employment

Special Circumstances

In special cases, **exceptions** may be made:

- Where an individual is not yet 18, but is out of the regular school system and has the prerequisites to move into a trade or post-secondary education, or the workplace.

  NOTE: For students under age 18 in the K-12 school system, Alberta Education will address their needs.

- To the provision of financial support for tuition and living costs, where the client who is eligible for DRES is in a post-secondary education program and has accessed the lifetime maximum funding available from his/her Canada-Alberta student loan. In this exceptional situation the client may be eligible for tuition and living costs from DRES, for up to two semesters of coursework. The client must be able to complete their studies within this timeframe. (See Section 8.2)

See section 7.5 for information on Education Supports

6.2 INELIGIBILITY

Individuals **may be ineligible for DRES** if they, or their supports, are covered by:

- Workers Compensation Board (WCB)
- Disability insurance
- Canada Pension Plan (CPP) – Disability
- Insurance settlements

There are cases in which a disability is the result of an injury for which benefits are the responsibility of third parties such as insurance companies or Worker's Compensation Board. DRES should not be the funder in these cases. Once WCB and insurance claims are closed, CPP eligibility should be determined. The client should use insurance claims that include re-training costs. All other funding sources should be investigated before assistance is provided under DRES.

6.3 PORTABILITY

For students coming from out of province for education, all efforts must be made to secure funding from the province of origin before DRES can be considered. For students attending post-secondary institutions outside of Alberta, DRES will follow them into the different jurisdictions where applicable.

6.4 DOCUMENTATION

Documentation to determine the nature (i.e. permanency of the disability) includes. but is not limited to:

- A doctor's letter
- A psychological assessment
- A functional assessment (Occupational Therapist, Physical Therapist or Vocational Rehabilitation consultant)
- Audiologist's report
- Ophthalmologist's report
- CNIB card

Note: Lack of documentation at intake will not deter or restrict the onset of work with the client. Documentation can be obtained during the process of working with the individual. However, all documentation must be provided before funding can be approved.

6.5 LENGTH OF DRES

DRES is to be provided for:

1. The development of a Client Investment Plan. When the Investment Plan includes education supports, these supports can be provided to a maximum of two and a half times the amount of time allocated for the standard education or training program.
2. Job maintenance assistance to a maximum of one year following placement into competitive employment.
   - ➢ Periodic interventions can be carried out for up to three years.
   - ➢ Where these interventions are necessary, each case will be assessed and reviewed on an individual basis after the three-year period.
3. During job crisis to maintain employment.
   - ➢ The client, AHRE consultant, and employer will work together to ascertain what supports are needed to enable the client to retain employment.
   - ➢ Ongoing supports after one year must be a cost shared agreement between the employer and DRES. e.g. disability related software upgrades where the employer share would be 75% of the cost and the DRES share 25%. (Other ratios may be used as appropriate.)

6.6 PROCEDURES FOR DRES APPROVAL

Once the AHRE consultant is confident regarding the client's goal and action plan, and the need for disability-related supports (including equipment), create an application file for DRES.

This DRES application file includes the following documentation:

- Consent for the Disclosure of Personal Information (AHRE 3043)
- Proof of disability (Medical, Psychological Report, O.T. Assessment, etc.)
- Outline of services/technologies needed to implement the Client Investment Plan (from the Coordinator of Services to Students with Disabilities at the school the student is attending, or from an employer, or a professional contracted to provide assessments to identify assistive service/technology needs)
- DRES Application/Approval form (AHRE 3628 or AHRE 3629)
- Other documents, if relevant (WCB, Long Term disability Insurance-LTDI, Income Support/AISH, CPP Disability, copy of DSG Section 4 Application, etc.)

Authorizing the DRES Application

- Review the recommended supports as outlined by the institution/assessor/employer, and evaluate the need for the recommended supports. Enter the supports needed on the DRES Application/Approval Form (AHRE 3628 or AHRE 3629), ensuring that the assisted services or assistive technologies requested are
  - supported by appropriate disability-related documentation
  - eligible for DRES funding.
- The client signs the Application form, confirming their need for the outlined supports.
- The AHRE consultant authorizes the DRES approval form, or amends the supports required or rejects the supports requested.
- The Expenditure Officer signs the Approval form.
- Provide the DRES file, including all required documentation, to the staff person responsible for ordering the services or technologies required.
- Generate an Approval Letter, outlining the specific services/supports/equipment that have been approved under DRES. Letters are sent to:
  - The client (student or employee)
  - The institution/employer
  - The client's file
- If DRES is not approved, send a letter outlining the reasons for rejection and the review process to the client. (See Section 11 – Request for Review)
- Enter DRES interventions on CAIS (See Section 9.0)

DRES Checklist of Information Required

Client Name _____ **SIN** _____

Date File Opened _____ **AHRE consultant** _____

Mandatory Forms (paper or electronic)	**On File**
❑ Documentation of Disability	_____
❑ Client Application (AHR&E 727)	_____
❑ Assessment and Investment Plan (on CAIS)	_____
❑ DRES Application/Approval Form	_____
❑ Letter	_____

Additional information	**On file**
Validation of career goal (research)	
Consent for Release of Information	
Specialized Assessment service report/results	
Other documents (from WCB, EI, AISH, CPP, Band)	
For Education Supports: – Course outline	
– Semester timetable	
– Copy of DSG Application form	
– Acceptance letter (from school) or document acknowledging application	
– Transcripts (or statements of progress)	
– Support letter from school counsellor for students with disabilities	
– Other information on program (start, end dates etc.)	
For Workplace Supports: – Letter of intent for worksite accommodation	
– Worksite assessment	
– Price Quotes for modifications, equipment, technologies	

7.0 Types of Disability-Related Supports Provided

DRES supports include providing funding for **assistive services** and/or **assistive technologies** to individuals with disabilities to assist them to access and participate in education, training or employment, through addressing barriers created by the disabilities.

The **INTENT** of providing assistive services and technologies is to level the playing field. The services and technologies provided relate directly to the disability and directly address the barriers to education, training or employment.

All purchase of services or technologies under DRES must be made with the **prior** approval of an AHRE consultant.

Supports can be provided in the following areas:

1. **Education Supports**

   Supports that assist individuals with disabilities to participate in education or training programs by providing assistive services such as a sign language interpreter, or tutor, and/or assistive technologies such as specialized software, Brailler, etc. These supports can be provided either directly to an individual or by institutions under agreements with Regional Management.

   For DRES clients participating in an approved training program, the maximum allocation is $75,000 per academic year – (August to July of the following year -includes assistive services and assistive technologies). (This maximum may be exceeded with Director approval. – See Guidelines Section 10.0)

2. **Job Search Supports**

   Supports that are over and above those provided by mainstream services. This could include, for example, provision of a sign language interpreter so a client with a hearing impairment can attend a job search workshop or rental of software and technical devices/supports that cannot be installed on a prospective employers' premises for the purpose of a job interview.

3. **Workplace Supports**

   Supports that assist individuals with disabilities to make the transition to the workplace and to stabilize in employment. Workplace supports include **on the job supports, worksite modification, and vehicle modification.**

7.1 ASSISTIVE SERVICES

Assistive services can be provided for job search, workplace support or educational purposes. Supports include such services as:

- Job coach
- Job developer
- Consulting services
- Sign language interpreter
- Transliterator (See definitions on page 43)
- Intervener
- CART (Computer Assisted Real time Transcription)
- Note taker/scribe
- Student Assistant
- Reader
- Tutor
- Academic strategist

These services may be provided under a contracted service arrangement.

See the Skills Investment Accounting and Financial Management Policies Manual for additional information on Contracted Services http://ahreintranet.gov.ab.ca/publications/#4

Ineligible Services

Following is a list of examples of supports and services **not** covered by DRES:

- Homemaker services
- Relief/respite care services
- Home care services
- Supports for caregivers such as counselling, training, or behavioural management
- Meal services
- Adult day care programs
- Personal Care Attendants

7.2 ASSISTIVE TECHNOLOGY

Assistive technology provides individuals with disabilities with the technology to access and participate in education, training or employment. DRES will address the barriers directly related to activities in the Client Investment Plan, and created by the disability(ies).

Technical accommodations and/or equipment will be used to directly address the barrier(s) to education, training or employment created by the disability. As an example, it is generally considered that all students need access to a computer. A visually impaired student needs voice recognition software, screen readers and optical character recognition systems in order to access a computer. In this instance, DRES could be used to purchase the software and added hardware, not necessarily the computer itself. Substantive rationale would be required to justify the need to purchase a computer.

DRES can provide technology for individuals in education, the workplace, during assessment, during job search, and in the case of a career or work environment change. Where technology is not a permanent need, such as during assessment or job search, rental of necessary equipment should be considered (e.g. laptop computer for job search interview process).

Assistive technology includes:

- **Devices** (equipment, products or systems) that may be acquired off-the shelf, modified or customized. The required technology must alleviate, reduce or remove a barrier to access and enable the individual to participate in education, training or employment.
- **Services** that directly assist an individual with a disability in the assessment, selection, acquisition, set-up or use of any device that will help compensate for the disability. This includes training on the use of the device.

ALL requests for assistive technology should be accompanied by a minimum of **two** cost quotes.

(See Section 10 for the payment process for Assistive Technology)

Assistive Technology Eligible Costs

Assistive devices covered by DRES **can include** but are **not limited to**:

- Technology (peripherals) and necessary software related to the disability. In situations where specialized computers are required to accommodate the software needed to address the disability, DRES may provide the funding. Computers are not generally paid for as they are considered an every day work tool for both employees and students.
- Assembling and on-site set-up
- Training the client in the use of the technology and the software that is required to address the barrier created by the disability
- Upgrading of technology or software **necessitated by a significant change** to physical, medical or employment circumstances which creates a significant barrier to work

performance. Additional assessment may be required to document the change of circumstances.

- Custom seating that has been prescribed to facilitate the disability
- Upgrading of software where there is a demonstrated need. It is not the intention that DRES pay for automatic upgrades to software that are not directly related to the disability.
- Electronic organizers if directly related to the disability.

In the case of such technical devices as the Blackberry, where airtime needs to be purchased and/or a contract entered into with a third party, the airtime and contract will be the responsibility of the employer or the individual. The exception here would be in the case where the device is being provided for Job Search Support where DRES would purchase a time limited or pay-as-you-go contract.

Hearing Aids

Provision of hearing aids that are considered above the level of standard provided by the Alberta Aids to Daily Living Program (AADL), is a special item that needs addressing.

If it can be shown that the individual can be in jeopardy of either losing their job, or being turned down for employment in a specific situation, then DRES will pay for the **balance of the cost** of the recommended device over and above the Alberta Aids to Daily Living (AADL) basic allowance for hearing aids.

Procedures:

- Determine that the specifics of the workplace are such that this is the appropriate support to address the barrier.
- An audiologist assessment must be done to validate the need for the hearing aid.
- An independent audiologist such as the AADL audiologist must review this assessment.
- Check with the local Regional Health Authority for the specific amount covered by AADL. If the client is not eligible for AADL assistance, then this amount will be treated as a deductible, and must be covered by the client.
- The AHRE consultant's supervisor must approve the expenditure under DRES.

As with all other forms of support, deciding what supports or services are appropriate to address the barrier should be a collaborative effort including the individual, AHRE consultant, employer and assessor. DRES will not provide supports or services that are not agreed to be appropriate by all involved parties.

Assistive Technology Ineligible Costs

- Training in non-specialized keyboarding

- Furniture including office equipment, desks, non-prescribed seating. It is expected that ergonomic furniture is a requirement for all individuals, not just those with disabilities.
- Capital purchases for employment or self-employment. The employer should provide the basic equipment required for the business. DRES would provide the peripherals needed to address the barriers (e.g. the employer supplies the computer and DRES provides a large print screen to the employee)
- Wheelchairs, prostheses, and other aids to daily living
- Computers are not generally paid for as they are considered an every day work tool for both employees and students. In situations where specialized computers are required to accommodate the software needed to address the disability, DRES may provide the funding
- Software other than that required to address the disability
- Insurance, Internet access, virus protection, backpacks and carrying cases (for laptops)
- Maintenance, repair and upgrades (except for reasons under eligible costs above)
- Any purchase made without prior approval for DRES funding

Procedures for Arranging Assistive Technologies

Initial Interview

The need to refer a client for an Assistive Technology Assessment and/or the need for a client to obtain Assistive Technology/Equipment may be identified by:

- The AHRE consultant in an assessment interview with a person with a disability who is a student, prospective student, or an employee
- The Centre for Students with Disabilities at the school the student is attending or planning to attend
- An employee who is in need of on-the–job technical support related to their disability, to perform the task of the job

Referral for Assessment to Determine Specific Assistive Technology Needs

AHRE consultant Responsibilities:

- Obtain and review detailed disability-related documentation from the client that supports the potential need for assistive technology
- Complete the Assistive Technology and Training Assessment Request form.
- Ensure the client signs the "Consent for the Disclosure of Personal Information" form (AHRE 3043), allowing pertinent information to be shared with the contractors.

- Identify the client in some manner which ensures subsequent correspondence to be e-mailed and/or faxed between the contractors and the AHRE consultant can be done without any personal identification (e.g. name) being revealed.
- Prepare a complete request for assistive technology assessment package including:
  - the completed request with Client Referral Number on it,
  - the appropriate Consent for the Disclosure of Personal Information form,
  - pertinent disability-related documentation.

Administration Responsibilities:

- Record the client identifier` on the Assistive Technology and Training Assessment Request form and log it (along with the client`s name) in a logbook.
- Make two (2) copies of the Request Form and the Consent for the Disclosure of Personal Information form.
- Mail the appropriate documents to the individuals checked off on the distribution list at the bottom of the Request form.
- Put a copy of the Request form, and the originals of the Consent form and the disability-related documentation, on the client`s file.

Referral for Assistive Technology Assessment

- The service provider receives the Assistive Technology and Training Assessment Request package and contacts the client to arrange a date for the assessment. The service provider will complete the assessment and generate the Report, Recommended Equipment List and Recommendations for Training **within a specified timeframe** of receiving the **complete** package. If the timeframe is longer than agreed upon, (usually because of incomplete information, difficulty in contacting the client or finding a mutually available date for assessment), the service provider will inform the AHRE consultant/referral source.
- The service provider performs the Assessment and develops a Recommended Equipment List, along with a rationale – outlining specific equipment and software, and the reasons they are recommending it for the client. They also identify the length of training they believe will be required to teach the client to operate the disability-related equipment and software.
- The service provider sends the Equipment List and outline of Recommendation for Training to the AHRE consultant.
- The AHRE consultant should contact the service provider if they have any questions, concerns, or wish to make changes regarding the assessment and/or the recommendations.
- The AHRE consultant is the final decision-maker regarding equipment to be ordered and training provided.

- The AHRE consultant is also responsible for determining if recommended items meet DRES guidelines.

Completing the DRES Application/Approval Form

- Record the equipment to be ordered on the DRES Application/Approval Form (AHRE3628 or AHRE3629).
- The client signs the Application/Approval Form, confirming the need for the equipment identified on the form.
- The AHRE consultant determines the level of support approved under DRES and signs as "Approved as requested", "Approved as amended" (and completes Part D) or "Not approved". If the AHRE consultant does not approve certain items, a letter is sent to the client outlining the reasons for not approving and providing the client the opportunity to have the decision reviewed. (See Section 11 – Request for Review)
- The AHRE consultant confirms in a letter to the client what supports will be funded under DRES.
- The client receives a copy of the Approval Letter, and the original is placed on the client's file.

Ordering the Equipment - AHRE

The DRES Application/Approval Form is given to the designated personnel who:

- Chooses a vendor from the recommended suppliers and the costs identified on the equipment list. Choice is based on cost, and/or equitable rotation (if the cost is the same) of suppliers.
- Develops a Purchase Order for authorized signature by the Expenditure Officer.
- Submits the purchase order to the vendor with instructions for delivery to be made to the appropriate service provider, client or employer.
- Submits a copy of the authorized Purchase Order to the appropriate contractor, client or employer.
- Procurement cards (P-cards) may be used in lieu of a purchase order (See Section 10 for payment).

Set-up of and Training on Assistive Technology

Upon receipt of equipment/software, the service provider or employer:

- Sends a copy of the signed packing slip to the AHRE Administration personnel who has ordered the equipment
- Contacts the client within a specified timeframe to arrange a schedule to deliver, install, and provide training

- Informs the AHRE consultant of the schedule
- Has the client sign a letter outlining the equipment received and the client's responsibilities for it. The service provider will keep this letter on their client file. The client also keeps a signed copy for their records.

Payment of Service Provider

- When services have been completed, the service provider will submit to AHRE an invoice and supporting documentation as requested by AHRE.

7.3 EDUCATION SUPPORTS

Education supports, primarily in the form of assistive services, are accommodations for individuals who, because of a disability, encounter barriers in a learning environment.

Educational institutions have a Duty to Accommodate. See Alberta Human Rights publication at: http://www.albertahumanrights.ab.ca/publications/Bull_duty_to_accom_students.asp

The **INTENT** of DRES is to assist the institution in their duty to accommodate students with disabilities. It is expected that AHRE, training providers and post–secondary institutions share the financial costs associated with providing supports and services to accommodate students with disabilities. AHRE works in collaboration with training providers and post-secondary educational institutions to create individualized Client Investment Plans and service plans for students with disabilities that outline the supports and services they require to access education.

People with disabilities who are in education or training programs and apprentices during the classroom portion of their apprenticeship training can access Education Supports through DRES, as long as they continue to make academic progress.

For students recently relocated to Alberta who cannot access funding from their province/territory of origin, residency eligibility criteria should not become a barrier to accessing Educational Supports. It is important that all persons with disabilities have access to the education system. However, every effort should be made to access funding from the province or territory of origin.

Determining the need for supports requires taking into consideration:

- The disability
- The barriers encountered because of the disability
- The complexity and demands of the program
- The supports available at the training institution
- Any recommendations made in Specialized Assessments or medical reports.

If the Client Investment Plan includes career change, skills upgrading, or career advancement and the goal requires participation in an educational program, DRES may be considered. The **INTENT** of DRES is to assist individuals to attend learning institutions on a full-time basis. However, many students with disabilities may not be able to attend fulltime. As long as the student is participating in at least 40% of a fulltime course load, as defined by the institution, the student will be considered fulltime for the purposes of providing DRES.

Reduced Course Load (RCL) and Alberta Works

1. Confirmation of a permanent disability must be accompanied by a recommendation for a reduced course load (at least 40%) from a professional (medical doctor, psychologist). This recommendation should outline the limitations or barriers that prevent the client from participating in a fulltime program. Documentation to this effect must be on file in order to approve the client eligible for full-time Learner Income Support while taking a reduced course load.
2. The Client Investment Plan must indicate that the employment goal is realistic, that the individual will be able to complete the required course load within the maximum time frame allowed under Alberta Works programming (40 months). (The 40-month limitation is not applicable if they are being financed under Canada Student Loans). The AHRE consultant can refuse the request for a reduced course load if they do not consider that the goal is realistic.
3. The determination of whether a client with a permanent disability receives Learner Income Support under a reduced course load or receives a part-time bursary will depend on the Client Investment Plan and what will best assist the client to obtain employment in the field of their choice. A client-centred, collaborative approach means that all decisions related to the need of the client are made in consultation with the client, the institution, the assessor and the AHRE consultant, and must consider:
    - The goal of the Client Investment Plan
    - The nature of the disability
    - The barriers encountered because of the disability (and the potential of DRES to minimize these barriers to enable the client to attend school on a full-time basis)
    - The complexity and demands of the program requested
    - The ability of the institution to provide a program that enables the client to take the program on a reduced course load.

A reduced course load is only considered if the client is unable to handle a full course load because of the nature of the disability (as documented by a professional). DRES would be considered to enable the student to attend fulltime, or if a reduced course load was their only option and they still needed additional supports. Should the client request a part-time program, they would then be considered on the basis of their eligibility for part-time training, and would be funded through part-time Bursaries rather than full-time Learner Income Support.

See Learner Funding Policy http://ahreintranet.gov.ab.ca/publications/#4

Assistive Services

Services provided to an individual with a disability to lessen or remove a barrier to education, such as services provided by sign language interpreters, student assistants, scribes, academic strategists and tutors. Personal care attendants are not included in this list.

Education Supports recognized as Assistive Services can include but are not limited to:

- **Sign language interpreter** - The term "qualified sign language interpreter" or "interpreter" means an interpreter who is able to interpret competently, accurately, and impartially both receptively and expressively, using any specialized terminology necessary to provide effective communication for a deaf/hard-of-hearing person. In the case of sign language interpreters, the AHRE consultant should use discretion as to what time usage is applicable for funding; i.e., class time, interaction with instructor, tutor etc. In most cases, eligible time will only include reasonable preparation time (the average is considered one hour of preparation for three hours of class), class time and time required for activities that would be considered practicum or project/assignments. Unless necessary, interpreter travel costs and travel time to accompany a student out of his or her area, will not be covered by DRES. Where interpreters are required in another jurisdiction (i.e. where the student travels to another city to participate in a class project), interpreters should be contracted from the city or region where the activity will take place.
- **Transliterator** - A sign language interpreter who communicates in Sign English as opposed to American Sign Language (ASL).
- **Intervener** - A sign language interpreter for the deaf-blind who uses ASL and physical contact for communication, usually signing on the hands.
- **CART (Computer Assisted Real time Transcription) Reporting** - The "computer assisted real time transcription" (CART) is a system in which a stenographer or court reporter using a stenograph machine transfers the words of a speaker by means of a computer to printed words on a screen in real time.
- **Note taker/scribe** - A scribe or note taker accompanies a student to class or to exams and writes for the student.
- **Attendant for Studies** - An Attendant for Studies helps a student by preparing and assembling materials required to complete academic projects or by accessing services that the student with disabilities may be unable to access.
- **Reader** - Can be either adaptive technology or human services for the purpose of communicating written language to a person with a disability. Refers to adaptive technology for speech synthesis systems, magnification systems, Braille systems and optical character recognition systems. These systems are used to transform inaccessible printed material into

speech or machine-readable form bringing the printed words to a person with visual impairments.

- **Tutor** - An individual who provides a student with individualized instruction in specific academic subjects that supports the classroom curriculum and instruction.
- **Academic strategist** - An educator with specialized knowledge of learning styles, issues and tactics that help students with learning disabilities develop strategies that focus on the students' strengths and maximizes learning opportunities.

Each case will be unique, and the caseworker should access the appropriate resources where clarification or help is needed. This will assure that the supports will be appropriate and effective.

Assistive Technologies

Assistive Technologies are available to students with disabilities, where the assistive device is directly related to the barrier created by the disability, and where the support provided addresses the barriers as they relate to the disability. Generally, computers and ergonomic furniture are considered necessary supports for any student and would not be funded under DRES.

Assistive Technology can include but is not limited to:

- Technology and necessary software related to the disability
- Assembling and on-site set-up
- Training the client in the use of technology and software required because of the disability
- Upgrading of technology necessitated by a change to physical, medical or employment circumstances or to support software changes. Additional assessment may be required to document the change of circumstances.
- Custom seating that has been prescribed to facilitate the disability.
- Upgrading of software where there is a demonstrated need. It is not the intention that DRES pay for automatic upgrades to software that are not directly related to the disability.
- Electronic organizers if directly related to the disability.

See Section 7.2 for information on Assistive Technologies

Length of DRES

DRES may be provided to a maximum of two and a half times the amount of time allocated for the standard education or training program. This assumes that a student with disabilities is attending studies on a reduced course load basis of 40% of a fulltime course load. (See Reduced Course Load, page 42)

DRES Maximum

The maximum amount of DRES funding is $75,000 per academic year. An academic year is defined as the period August 01 to July 31 of the following year.

DRES and Other Post-Secondary Funding Options for Disabled Students

Individuals with disabilities applying for post-secondary schooling have a number of options available to assist with financing their education. Under the Shared Agreement, AHRE provides assistance to individuals with disabilities to access funding through Student Finance.

For a complete listing of funding options see the Post-Secondary Helper's Guide at **https://phoenix.edc.gov.ab.ca/login/LAD/pdf/helpers_guide_postsec.pdf**

See Special Student Situations – Students with Permanent Disabilities, Schedule 4 – Persons with Permanent Disabilities, page 225

For post-secondary students eligible for student loans, a Canada Study Grant for Students with Permanent Disabilities (DSG) to a maximum of $8,000 per year may be appropriate and will be accessed as a first measure, prior to providing funding under DRES.

The Access Grant is a federal grant provided to students with disabilities to address living and education costs – tuition and books– of full or part-time students with a permanent disability. The maximum amount of this grant is $2,000 per given loan year.

Learners who are not eligible for Canada Student Loans may be eligible for the Alberta Grant for Disabled Students, to a maximum of $1,000/semester.

There are three scenarios in which DRES may be used to assist Post-Secondary students with disabilities:

1. Students may still be eligible for DRES funding for educational supports if they are not eligible for Student Loans.
2. Some clients may have needs that exceed the $8,000 available under the DSG and the $2,000 available under the Access Grant. DRES may be used to ***augment*** these grants for disability-related supports. DRES eligibility criteria must be met, particularly as it relates to labour – market destination. Whenever possible assistive technologies should be funded to their maximums under DSG, while assistive services are funded under DRES. As there are some discrepancies as to what will be funded under DRES and DSG, see the chart below to determine what may be provided under each funding mechanism. Combining the two forms of funding should be done in a collaborative means with the student, the education institution and the AHRE consultant, to ensure that the individual needs of the student are met.

   NITE: The client needs to be informed that all funds provided under DSG must be reflected in receipts at the end of the year.

3. DRES may also be used as an income support mechanism for learners who, because of the barriers caused by the disability, exceed the lifetime funding maximums of Grants and Loans. See Section 8.2.

Available supports under DSG and DRES

Item	DSG	DRES	Comments
Sign Language Interpretation	Yes	Yes	
Oral interpretation	Yes	Yes	
Tutors	Yes	Yes	
Note -takers	Yes	Yes	
Computers and other technical aids	Yes	Under exceptional circumstances where substantial rationale is provided	Under DRES, computers are considered to be a tool required by all students, not just those with disabilities. (Adaptive software may be provided)
Alternative formats	Yes	Yes	
Technical or recording equipment	Yes	Yes	
Readers	Yes	Yes	
Attendant Care	Yes	No	
Specialized transportation to and from educational institution	Yes	No	Under exceptional circumstances where available transportation is not an option, or the disability precludes the use of available transportation, DRES may support transportation
Ergonomic furniture	Yes – for those with a physical disability	No	Ergonomic furniture is considered a necessity for all students, not just those with a disability

Item	DSG	DRES	Comments
	only		
Hearing aids	No	Maybe (costs over and above ADL)	DRES – See Section 7.2
TTY Phones	No	No	Considered an aid to daily living
Wheelchairs	No	No	Considered an aid to daily living
Internet access	No	No	All students require this
Vehicle modification	No	Yes (if no other mode of transportation is available)	
Electronic Organizer/ Daytimer/ Palm Pilots	No	Maybe (would have to be related to the disability)	
Replacement, insurance, repair costs, extended warranties	Yes	No	
Learning Disability Assessment	Yes (75% of cost)	No (could be funded under CEAS)	
Exam Accommodation	No	Portions	DRES may cover assistive services such as readers and alternative formats, but does not cover institutional costs such as room costs and administrative costs associated with the room/exam setup.

For Procedures related to DSG processing of Schedule 4's, see the Post-Secondary Helpers Guide https://phoenix.edc.gov.ab.ca/login/LAD/pdf/helpers_guide_postsec.pdf

Relationships with Post-Secondary Institutions

The Disability Student Coordinators (DSC) at post-secondary institutions do much of the work involved with the delivery of DRES. At present, over 70% of the annual DRES budget is spent in the post-secondary environment.

The DSC's coordinate and contract services such as:

- Tutors
- Scribes
- Note takers
- Student assistants
- ASL Interpreters
- Transliteraters
- CART captioners
- Academic strategists

Developing and fostering strong, trusting, collaborative relationships with Post-Secondary institutions, training providers and high schools is an important activity that has several value added components from an AHRE standpoint. It is especially important to keep open communication with those institutions with a high population of students with disabilities. They are major stakeholders and interacting with them serves several different functions:

1. DRES addresses individual needs and these needs vary significantly from person to person and disability to disability. It is very hard to forecast expenditures and administer budgets without first hand knowledge of specific supports requested, and frequent monitoring of actual expenditures and trends.
2. Meetings will allow for the planning of anticipated needs as well as monitoring and reassessing forecasted expenditures.
3. From a cost containment vantage, the DSC's often become the DRES pre-screen by ensuring that Student Finance and the Disability Study Grant (DSG) are accessed prior to applying for DRES.
4. In the case of many large institutions, Specialized and Assistive Technology assessments can be handled in-house and at a lower cost than contracting out.
5. Under Human Rights legislation, the institutions have a duty to accommodate individuals with disabilities. Meetings will help insure that DRES is used appropriately to assist the institution in their duty to accommodate. Dialogue with the DSC's allows AHRE staff some influence in the development of the institution's policy around students with disabilities, as well as how they deliver services for those students. This will impact the DRES budgets directly, and the shared responsibility between the student, institution and AHRE indirectly.

For more information relating to an institution's "Duty to accommodate" see Alberta Human Rights website at:
http://www.albertahumanrights.ab.ca/publications/Bull_duty_to_accom_students.asp.

6. Dialogue allows AHRE staff to monitor changes in programming (i.e. fee increases) that may impact DRES expenditures.
7. Ongoing communication ensures an accurate tracking of monies committed vs. monies spent, enabling funds to be freed up for further spending and ensuring that very little slippage occurs at the end of the fiscal year. Having institutions invoice on a monthly basis allows for tighter comparisons between commitments and expenditures, thus better tracking and budgeting.

By building and maintaining a person-to-person relationship with the DSC's, AHRE staff can better:

- Plan, forecast and commit DRES funds for an academic year
- Streamline the provision of services to the student
- Share responsibility amongst AHRE, the institution and the student to be efficient and cost-effective.

7.4 JOB SEARCH SUPPORTS

The **INTENT** of DRES is to cover supports for job search that are over and above those provided by mainstream services. This could include, for example, provision of a sign language interpreter so a deaf client can attend a job search workshop. In the case of job search, individuals with disabilities may require services that are longer in duration and more extensive than traditional mainstream services.

Services can include but are not limited to:

a) **Supported job search** – in which assistance is supplied to help the person with a disability type up a resume, contact employers, etc.

b) **Job development** - modifying or developing a job to fit the needs of an individual with a disability.

c) **Work exposure** - unpaid, time-limited individual placement in a community work situation to assist the client in determining the appropriateness and the suitability of a specific job and to provide opportunities for the client to develop the skills and contacts to obtain and maintain employment.

d) **Work experience** - time-limited work with a training plan.

Many of these services may be provided under a contracted service arrangement.

Technologies may include but are not limited to:

- Software and technical devices or supports that cannot be installed on a prospective employer's premises for the purpose of a job interview. In these cases, DRES may be used to rent the necessary devices (laptop computer for example) to support the client.

Deciding what supports or services are appropriate to address the barrier should be a collaborative effort including the individual, AHRE consultant, and employer. DRES will not provide supports or services that are not agreed to be appropriate by all involved parties.

7.5 WORKPLACE SUPPORTS

Employers have a duty to accommodate which is outlined in Human Rights Legislation and which is available through the Alberta Human Rights website:

http://www.albertahumanrights.ab.ca/publications/Bull_duty_to_accom.asp

The **INTENT** of DRES is to assist employers in their duty to accommodate their workplace to enable the full participation of employees with disabilities. DRES is provided to assist people with disabilities to enter the workforce, or to assist them to keep their employment when it is threatened by a change in the disability, or to upgrade their position in the organization.

Employers in the public sector are not generally eligible for DRES funding. DRES can be provided to employers in the private sector and not-for profit sector on a cost-shared basis. Factors to be considered in the negotiation of the costs shared include:

- The size of the employer
- Whether or not the employer falls under Employment Equity legislation (Crown corporations, federal departments, those employers who are federally regulated with more than 100 employees and those who have contracts with the federal government of more than $200,000)
- The number of people with disabilities that the employer has on staff or is willing to hire.

When working with employers to assist people with disabilities obtain employment, considerable emphasis needs to be placed on ensuring that employers have access to information related to the kinds of workplace supports that are available to help them accommodate the needs of employees with disabilities. Knowledge of the types of workplace modifications that can be made, as well as the various technologies that are available, can lead to a breaking down of barriers to the employment of the client. Additionally, support that can be provided to employers to help them redesign job descriptions or assess systemic barriers can go a long way to facilitating accessibility in the workplace.

Workplace supports assist individuals with disabilities to make the transition to the workplace, to stabilize in employment, and to maintain or further their position in the workforce.

DRES, in the form of workplace supports, covers services and technologies that are over and above those provided by mainstream services, such as those provided to all adult Albertans through the Career Information Services. Within the workplace there are a variety of services and technologies that fall under the broad category of workplace supports.

Deciding what supports and services are appropriate to address the barrier should be a collaborative effort including the individual, AHRE consultant, employer and assessor. DRES will not provide supports or services that are not agreed to be appropriate by all involved parties.

Self-employment is considered a valid means of employment. Workplace supports will be considered for funding under DRES in the same context as employment in any other workplace – that is, technologies and services, over and above those provided by mainstream services, that address those barriers created by the disability. For example, a computer is considered a requirement of any business, and therefore would not be funded through DRES. However, software for a voice-activated computer may be a requirement to address the barriers created by the disability and supported through DRES for an individual with a visual impairment.

Workplace supports include:

Services: On the Job Supports

On the job supports include those interventions required by the disability and provided at the work site to:

- Assist the new employee to adjust to a new workplace, or
- Stabilize and maintain the performance on the job (job maintenance) of a current employee undergoing job crisis (i.e. facing the prospect of losing a job due to factors related to the disability), or
- Assist in upgrading the skills of a current employee to take on additional responsibilities or be promoted to a higher level.

AHRE consultants or agency support workers may facilitate these supports. Supports **can include** but **are not limited to**:

a) **Orientation**: helping a client develop an overview of the job duties and responsibilities, the role of the supervisory/management staff, the employer's expectations regarding performance, work hours, pay, funding, vacation, time-off etc. Orientation supports may be available for the first three months under On the Job Supports.

b) **Job Development**: consulting with an employer regarding the development of job descriptions and job duties to provide a better fit with a client's abilities and limitations.

c) **Consultative Services**: providing the client, the client's co-workers, supervisors, and/or employer assistance with the client's adjustment to the job and the work environment, assisting in the acceptance of the client by co-workers, consulting on adjustments needed in the work environment, and in the resolution of issues that arise (mediation).

d) **Job Enhancement/Advancement**: identifying possible employment training and support services that may help the client learn new job tasks and/or develop different occupational goals. The Client Investment Plan will determine the length of training or support required, but the upper limit is one year of assistance. For supports beyond this period, refer to Job Crisis Intervention.

e) **Job Crisis Intervention**: providing assistance for an individual who is at risk of losing his/her job because of the barriers created by the disability. DRES can cover the cost of supports provided on an as-needed basis. This is most often assistive technology but may also be in the form of occasional coaching, assessment, or consultative services, if initiated by the employee or the employer.

   Employer responsibility or duty to accommodate a newly diagnosed or injured worker would be considered job crisis, even though the individual may not have accessed DRES previously. If the employee is injured on the job site, Workers Compensation should be a part of the assessment of employee needs for support.

f) **Job Coach**: provides support on the job to the individual to learn and adjust to his or her responsibilities. The length of time necessary is dependent on the individual's needs. Job coaches may be required at the start of new employment for up to one year, and whenever job duties change or job crises arises.

g) **Follow-up services** beyond those required by Albertans who do not have a disability.

h) **Case management** and/or intervention as needed to support the client with disabilities in the workplace.

Deciding what services or supports are appropriate to address the situation should be a collaborative effort including the individual, employer, AHRE consultant, and assessor. DRES will not provide supports or services that are not agreed to be appropriate by all involved parties.

Workplace services supported by DRES are generally considered to be employee specific and are provided as supports to the individual.

The maximum support provided per individual in the workplace is $35,000.

Job Maintenance support may be provided up to one year following job placement or crisis intervention.

Technologies:

Employees may require assistive technologies to help them be productive in their work. These technologies may include things such as voice-activated software, Braillers, screen readers, optical character recognition software, specialized equipment added to wheelchairs, and/or tools that are specially designed for the individual to perform the tasks of the job.

Workplace technologies funded by DRES are generally considered to be employee specific and are provided as supports to the individual. The technologies would then belong to the individual and would be transported with them to another job, should they leave the original place of employment. If the technology remains at the workplace, it is anticipated that the employer would share the cost of the technology.

The maximum support provided per individual in the workplace is $35,000.

Worksite Modifications

Worksite modifications may include, but are not limited to:

- Structural alterations made to privately owned or operated buildings that address barriers to employment for an individual with a disability.
- Modifications to a specific worksite (i.e. staff-only area), in publicly-owned or operated or publicly-subsidized buildings, which are required solely to enable an eligible client to have access to a place of employment, may be considered on an individual basis.

Deciding what modifications are appropriate to address the barrier(s) in the workplace should be a collaborative effort including the individual, employer, AHRE consultant, and assessor. DRES will not provide supports or services that are not agreed to be appropriate by all parties.

The approved list of structural alterations **can include** but is **not limited to**:

- Ramps
- Inside and outside wheelchair lifts
- Widening doorways
- Making a washroom accessible
- Raising, lowering or adapting a workbench or desk
- Adapting equipment for the specific use of the person with a disability
- Tactile considerations to accommodate vision loss
- Change of environment to accommodate vision or hearing loss i.e.: anti-glare surfaces, high contrast environment, stair nosings, noise damping
- Lighting modifications
- Lever style door handles
- Power door openers
- Hand controls or lifts for employer's vehicles

Assessment of worksite modifications can be facilitated by contacting the appropriate organization related to the client's disability and requesting that they do an assessment of the worksite with the client, case worker and employer. In the major urban centres, there are agencies that specialize in barrier free accessibility that can be resourced.

Modifications to an **employer owned vehicle** may be funded where the job description requires the individual with a disability to use a company vehicle. In this case the modification can be recognized as a worksite modification.

Employers must supply a minimum of two quotes for modifications to be made to a workplace.

Workplace modifications may be cost-shared with the employer up to 50% of the costs of the modifications to a maximum of $10,000 per employee with a disability, and up to $40,000 per workplace. (Reference: Employment and Training Benefits for Persons with Disabilities Regulation 3 (3))

Example: Renovations to a worksite cost a total of $5000. DRES may cover 50% of the cost, in this case $2500.

If the employer pays $100,000 for the installation of an elevator to accommodate five employees using wheelchairs, DRES may pay up to $40,000.

See Section 10 for the payment process for Worksite Modifications.

Vehicle Modifications

Vehicle modifications funded by DRES are those special features which are not ordinarily required by the owner of a vehicle and are made to the client's own vehicle to accommodate the disability.

Vehicle modifications may be considered for an employee with a disability only when use of the their own vehicle is a bona fide job requirement (e.g. truck driver, courier) or if no alternate modes of transportation such as disabled transportation services, low floor buses etc. are available to and from the work site. DRES does not provide funding for the purchase of a vehicle or for regular repairs to or operating expenses of the vehicle.

Modifications to an employer owned vehicle can be funded where part of the job description requires the individual with a disability to use a company vehicle. In this case the modification can be recognized as a worksite modification. (See section above.)

Deciding what modifications may be appropriate to address the barrier should be a collaborative effort including the individual, employer, AHRE consultant, and assessor. DRES will not provide supports or services that are not agreed to be appropriate by all involved parties.

See Section 10 - for the payment process for Vehicle Modifications.

Length of DRES

DRES can be provided for:

- Job maintenance assistance to a maximum of one year following placement into competitive employment.
- Periodic interventions for up to three years.

- Interventions deemed necessary with each case assessed and reviewed on an individual basis after the three-year period has expired.
- Job crisis, in which an individual with a disability may be in jeopardy of losing his/her employment because the disability prevents him/her from performing essential job duties. The incapacity must be demonstrated to a degree where it can be reasonably anticipated that employment loss will result if these services are not provided. Eligibility will be determined on the basis of incapacity due to the disability and its severity in terms of job performance. The client, caseworker, and employer will work together to ascertain what supports are needed, and for what length of time, to enable the client to retain employment.

Ongoing supports after one year must be a cost shared agreement between the employer and DRES. e.g. disability related software upgrades where the employer share would be 75% of the cost and the DRES share 25%. (Other ratios may be used as appropriate.)

DRES Maximums

Workplace modifications may be cost-shared with the employer up to 50% of the costs of the modifications to a **maximum of $10,000 per employee with a disability, and up to $40,000 per workplace**. (Reference: Employment and Training Benefits for Persons with Disabilities Regulation 3 (3))

Workplace services and assistive technologies are available up to **a maximum allocation of $35,000 per job-site** for DRES clients to maintain employment or self-employment opportunities.

8.0 Special Client Situations

8.1 Specialized Payments

Some categories of learners may be eligible for funding support which could include educational costs such as tuition, books, supplies, room and board, living allowances, accommodation, meals; transportation including parking, bus pass, vehicle mileage, or air fare. Those who may be eligible are:

- Individuals who, because of their disability, have reached their legislated lifetime maximum under Canada-Alberta Student Loans.
- Students at specialized schools such as Gallaudet College.

8.2 DRES Income Support

DRES is not an income support program. When the Client Investment Plan is developed, every effort should be made to ensure that post secondary education can be completed before the loan maximum is reached. DRES does not support planned extensions of a program beyond the loan maximum. If a loan maximum is reached due to an unplanned event or an extenuating circumstance related to the disability, the student should explore available loan remissions first. DRES should be a last resort used only on rare occasions where the circumstances are such that the student is put at a disadvantage due to their disability and the inability to complete the program within the timeframe allotted.

Students who have exceeded their legislated lifetime maximum student loan because of a disability may be eligible for DRES income support. The potential need for DRES income support should be identified in the Client's Investment Plan well in advance of the actual need and prior to the commencement of the last year of study. DRES will assist with income support only to a **maximum of two semesters** to enable the individual to complete their program. In the event that the student has not completed their program within the two semesters, DRES will not be extended.

Under this exceptional circumstance, DRES will provide tuition and books and a living allowance commensurate with the amounts received under the Canada Student Loan Program, in addition to the supports required related to the disability. The student is expected to apply to the Canada Student Loan program first for considerations made for students with disabilities –e.g. loan remissions.

8.3 GALLAUDET COLLEGE

Gallaudet College is a specialised college in Washington, D.C. that provides post-secondary education to deaf students in an American Sign Language (ASL) environment. Gallaudet is government funded and charges a surcharge for out-of-country students. The tuition is very high. DRES will consider funding deaf students to attend Gallaudet as the cost of interpreters is included in the tuition cost.

For Gallaudet College, DRES will pay an amount **equal to** the following: (this can be documented on the DRES approval form)

- One return airfare per year
- Tuition: Gallaudet tuition minus the Alberta equivalent. To confirm the Gallaudet tuition amount the student should check with the school. For example, if fees for a student doing a year towards a BA at the University of Alberta are $4000, and at Gallaudet $20,000, DRES would pay $16,000. The tuition amount includes the health service costs and the unit fee, as they are both mandatory fees. For the Alberta tuition, for an equivalent program such as business or education, the student should get this figure from the Alberta institution and include the health fee in this amount.

Procedures:

Since applications to Gallaudet College are infrequent, the Regional or Provincial DRES coordinator should be consulted regarding procedures.

NOTE: This process takes a lengthy period of time. The student should be advised of the necessity of making early application, prior to the start of the school year.

9.0 CAIS

All clients applying for DRES should have a Level 3 assessment and a Client Investment Plan outlining the client's steps and employment goal.

- Disability related information must be entered on the following screens:
  - Assessment Screen
  - Assessment Factors
  - The Profile screen
  - Disabilities screen
  - Other Assessment Screen-DRES

For reporting purposes DRES information is collected from the Disability screen (DIS-) and the DRES assessment screen under OTHER Assessments.

DOCUMENTING DRES ON CAIS

- In order to enter assessment information on the Main Page, the status must read "in progress"
- Enter Y for Yes in field 09, the Disability Question "Does the Client have a disability that's a barrier to employment?"
- Each of the Factors, Profile, Disabilities and Other Assessments is on a dropdown screen.
- The factor identified as functional impairment/disability (IMP) should be identified on the Assessment Factors (FAC) screen.
- The Profile (PRO) screen provides a notes page to enable you to record a narrative summary of the client's presenting circumstances and assessment conclusions and to provide details related to the barriers faced by the client, as well as recommendations to overcome the barriers.
- On the Disabilities screen, in field 01 enter the primary disability and secondary (if required) that is a barrier to employment and requiring assistive services/technology. Include a brief explanation of the disability.
- On the Disabilities screen, in fields 03 - 07 enter the type of support and funding stream and brief description to reflect the assistive services/technology being provided. You may enter more than one support.
- DRES is entered on the OTHER (OTH) Assessment screen. When a client meets DRES eligibility requirements and has been approved for supports, record Y (YES). Record specific dollar amounts and types of supports on the client paper file.

ACTIVE LEVEL 3 APPLICATION- CLOSED ASSESSMENT

If a Level 3 intervention is underway (Active), and the need for assistive services/supports is identified/confirmed **after the Level 3 Assessment screen status has been closed**, the steps for documenting are as follows:

- **Step 1** – Print a copy of the "Assessment" screen to capture the closure status code and the date of closure.
- **Step 2** – Return the status to "IP" In Progress (changes/additions/deletions cannot be made unless the Assessment status is set at In Progress).
- **Step 3** – Review the Assessment screen to ensure that the response in field 09 - "Does the Client have a disability that's a barrier to employment?" - has been entered as Yes. The disabilities indicator must be set to yes before proceeding to the Disability screen.
- **Step 4** – On the Disabilities screen, in field 01 enter the primary disability that is a barrier to employment and a brief explanation of the disability. If a client has several disabilities, enter those disabilities requiring the assistive services/technology as the primary or secondary disability.
- **Step 5** – On the Disabilities screen, in fields 03 - 07 enter the type of funded disability support and a brief description to reflect the assistive services/technology being provided. You may enter more than one support.
- **Step 6** – Reset the "Assessment" screen to the original closure status code and the original date of closure as found on the version you printed in Step 1.
- **Step 7** – Record the results of the DRES interview conducted in the Other Assessment screen by typing OTH, then DRES.

ACTIVE LEVEL 3 APPLICATION – OPEN ASSESSMENT

If a Level 3 intervention is underway (Active), and the need for assistive services/supports is identified/confirmed and **the Level 3 Assessment screen status is still open** only Steps 3 – 5, as well as Step 7 need to be completed.

10.0 PAYMENT PROCESS

10.1 AUTHORIZATION AND PAYMENT OF DRES

The *Government Services Act* stipulates that government staff **must** authorize all grants. Therefore there must be an approval process in place in each Region for the commitment of DRES support. There must be:

- An Application Form entered in CAIS
- A DRES Approval form
- An invoice, and
- The transaction must be entered in IMAGIS

See http://ahreintranet.gov.ab.ca/publications/#4 for Financial Policies

DRES MUST be approved prior to purchase. DRES does not reimburse clients who have purchased their own devices or services prior to consultation with an AHRE consultant. Before the devices or services are provided to the client, the regional DRES authorizer or AHRE consultant must review the assessment of the client's needs and eligibility, and authorize the expenditure for DRES funding.

The procedure for ensuring that the payment process follows auditable financial procedures is to ensure that complete documentation is on file. The following documentation is required:

- Documentation of the disability presented by the client as described in the eligibility section
- Client Application form (AHRE 727) completed and signed by the client
- Consent for the Disclosure of Personal Information form (AHRE 3043), completed and signed by the client
- Client Investment Plan completed and signed by the client
- DRES Application/Approval Form (AHRE 3628 or AHRE 3629) completed by the AHRE consultant, listing the items to be purchased
- Results of any Specialized Assessment services, to be kept on the client paper file and entered into CAIS.
- CAIS documentation including assessment, identification of disability and required supports under DRES, Client Investment Plan, case management, and follow-up.
- Invoice
- Receipt of DRES signed by client or AHRE consultant

The DRES Application/Approval Form is prepared including the client's name, the items to be purchased, the codes to which the items are to be charged, how the items will be paid for (Direct

Purchase Order or Procurement cards) and the signature of the authorized DRES delegated authority, as well as the Expenditure Officer.

All Financial data will be entered in IMAGIS.

Once the DRES Approval Form has been authorized, the items may be ordered from the vendor with an anticipated delivery date. Payment is made upon the receipt of the invoice and verification of receipt of the goods by either the client or the AHRE consultant (in concert with the contractor who is setting up the equipment).

Payment through Direct Purchase Order (DPO) is preferred, but Procurement-cards (P-cards) may be used in accordance with P-card spending limits and procedures.

Note: In instances where the purchase of equipment requires special ordering (it is not available "off the shelf"), and requires advance payment, check with your Expenditure Officer to arrange the process to accommodate this.

10.2 IMAGIS FUNDING CODES RELATED TO DRES FOR 2004/2005 FISCAL YEAR

Program Codes for <u>all</u> DRES expenditures (*exception – assessments*) is <u>07261</u>

(Assessments are coded under <u>07609</u>)

Category	Definition	Project Code	Account Code
EDUCATIONAL SUPPORTS		**02131**	
• **Assistive Technology**	Assistive technologies designated for education and training, including supplies and alternative formats	**02131**	**563950** (formerly 553840)
• **Services-Tutor/ note taker/ Scribe/ other services**	Tutors, note-takers, scribes or others providing services for education and training, including instruction on the use of assistive technology, etc.	**02131**	**563930** (formerly 544150 & 551310)
• **ASL/Cart**	ASL interpreting and CART reporting services specifically provided in education and training	**02131**	**558080** (formerly 544130)

Category	Definition	Project Code	Account Code
• **Post-secondary grants**	Living allowances, books, tuition, transportation, etc. to those students who have exceeded their yearly or lifetime maximums under CSL, or who have been approved for Gallaudet College	**02131**	**558010**
JOB SEARCH		**02132**	
• **Assistive Technology**	Temporary assistive technology or supports that are used while looking for work	**02132**	**563950** (formerly 543320)
• **Services**	Services such as ASL interpreters required for work search	**02132**	**563930**
WORKPLACE SUPPORT		**02133**	
• **Assistive Technologies**	Assistive technology designated for use in the workplace by the employee with a disability, including vehicle modifications required for transport to the workplace	**02133**	**563950** (formerly 553560)
• **On the Job Services**	Interventions required by the employee with a disability to stabilize and maintain their performance on the job as it relates to their disability including coaches, training in the use of assistive technologies, etc.	**02133**	**563930** (formerly 544200)
• **Worksite Modifications**	Worksite modification that addresses a barrier to the person with a disability, including structural changes or adaptations to equipment, and vehicle modifications required for work.	**02133**	**558010** (formerly 541040)

Note: Descriptions in the IMAGIS System may not completely match with the descriptors in this list. Authorization and processing will be based on the descriptors contained in *this* list.

10.3 CLIENT – PURCHASED SUPPORTS

There will be times when circumstances make it appropriate to have the client purchase the services/technologies and be reimbursed. In this case, once the service or technology has been authorized, the client may make the purchase and submit the receipt for reimbursement.

In the case where the client needs the funds prior to the purchase, the AHRE consultant can:

- Have the client fill out a request for supports/services required
- Have the form authorized and a cheque issued to the client
- Have the client return the necessary receipts to verify expenditures
- Have the client fill out and sign the "Statutory Declaration" (AHRE 2557) form if the client does not have the required receipts.

Where timeliness is a concern, the AHRE consultant should make every effort to ensure that the authorization process does not become a barrier to successful employment.

- Invoicing and payment processes must comply with AHRE financial policies.
- Payment of DRES is authorized under the Income and Employment Supports Act, Division 5 and its attendant Regulations.
- Payment will be authorized utilizing the established Regional process using:
  - A Fee for Service Contract or
  - A Direct Purchase Order or voucher, or
  - A Procurement card may be used in instances where small equipment items are purchased or where it is not possible to set up an account with the vendor.

10.4 ELIGIBLE PAYMENTS

Specialized Assessment Services

- All Specialized Assessment Services (and related costs e.g. travel, etc.) will be paid using the CEAS budget.
- Referrals to specialized assessment services can be made by AHRE staff or by authorized third party providers such as agencies contracted to provide services for AHRE.
- Documentation of the referral to specialized assessment services is to be recorded on the CAIS Other Assessment (OTH) screen. Indicate in field 1, Type of Assessment: [SA] for the Referral to Specialized Assessment. In the Comments field, enter: "Referred to Specialized Assessment for……. (functional, medical, psychological, etc.)".

FEE SCHEDULE FOR SPECIALIZED ASSESSMENT SERVICE PROVIDERS

a) Professional Fees

- To the maximum approved by the professional association, if one exists, where fees are set.
- For professionals who do not have fees set by an association, the fee schedule is based on local market prices.
- Expenses are to be billed separate from the fee for service. Where more than one client is being assessed in any one location, the travel costs of the assessor should be shared among the clients.

b) No shows/Cancellations

- Fee for one hour professional rate plus applicable travel costs:
  - Mileage = Current government rate
  - Travel Time = Door to door may be charged at half the professional hourly rate
  - Meals = Current government per diem rates. A gratuity cannot be claimed in addition to the meal allowance.

c) For other service providers

In the case where service providers are required to travel outside their locality to provide services, they are eligible to charge their full hourly rate for travel time, and will use government rates for kilometres.

Transportation, Meals and Accommodation

FOR CLIENTS

Transportation will be provided to attend a Specialized Assessment if the nature of the individual's disability prevents the individual from being able to use public transportation or if the individual must travel to a different location for the assessment. Meals and accommodation as required are also covered.

a) Post-travel Payment

1. A travel expense form (G0690) is supplied to the individual who completes and submits it along with receipts to the AHRE office for approval and processing.
2. Where the client does not submit receipts, the client signs a "Statutory Declaration" form (AHRE 2557) declaring that he/she has spent the monies as per the outlined costs.
3. The cheque is mailed directly to the individual.

b) Advance Payment

If the individual requires payment prior to incurring expenses, the following process should be followed:

1. Client completes a request for travel costs required.
2. The CEC and the Expenditure Officer sign for approval and processing. Where possible, if travelling by carrier, arrangements are made to provide payment directly to the carrier.
3. If the client is providing his or her own transportation, a cheque is issued for client pickup prior to travel date.
4. Upon completion of travel, client submits receipts.
5. Where the client does not submit receipts, the client signs a "Statutory Declaration" form (AHRE2557) declaring that he/she has spent the monies as per the "Travel Costs Required".

FOR SPECIALIZED ASSESSMENT SERVICE PROVIDERS

Specialized Assessment service providers will include transportation, meals and accommodation costs in their billing to AHRE. Where more than one client is being assessed in any one location, the assessor may only bill these expenses once per trip.

Assistive Technology

See Section 5.2 for guidelines for assessors for Assistive Technology.

- The purchase and set up of equipment and training for an individual is part of assistive technology.
- These costs are funded using the DRES funding codes under Job Search, Workplace Support or Education Support.
- A DPO or a P-Card can be used to purchase equipment within spending limits
- At least two suppliers should be contacted for competitive pricing except in special circumstances.

In the case where there is only one local supplier who can supply technical and/or practical support to the individual or it can be shown that there is another compelling reason for sole sourcing, this will take priority over the need for competitive pricing.

PURCHASE OF EQUIPMENT

There are two options regarding the purchase of equipment:

- The AHRE consultant or contracted agency can work with the client, the agency providing the supports, and wherever possible, the employer or educational institution, to determine

exactly what is needed. Once decided, a DRES Application/Approval Form (AHRE3628/29) is completed. The client brings in at least two quotes from suppliers, OR;

- The AHRE consultant can purchase the agreed upon equipment for the client. Where possible, the AHRE consultant obtains at least two quotes for the equipment. The chosen supplier is then paid on invoice for the equipment. The client must still receive a contract letter and the equipment.

Workplace Supports

See Section 7.3

- The AHRE consultant will work with the client, contracted agency providing the supports, and wherever possible, the employer, to determine exactly what is needed and completes a contract. Costs are paid to the individual or the service provider on receipt of an invoice based on the contract.
- Individuals receiving such supports are required to verify receipt of the goods or services, by signing a statement to that effect.

Worksite Modifications

If an individual requires worksite modifications to perform job duties and maintain employment, AHRE may cost-share with the employer up to 50% of the cost of the modification **to a maximum of** $10,000 per individual with a disability. Grants to an employer cannot exceed $40,000 per worksite.

Example: Renovations to a worksite cost a total of $5000. DRES covers 50% of the cost, in this case $2500.

If the employer pays $100,000 for the installation of an elevator to accommodate five employees using wheelchairs, DRES may pay up to $40,000.

- A letter of agreement is sent to the employer and payment is made upon submission of a receipt.
- Most worksite and vehicle modifications required for work will be paid using the DRES funding codes and following the established Regional procedure.
- Worksite assessment costs can be included and paid for under one of the options outlined in Section 10.1. Take advantage of free assessments provided by agencies such as Alberta Committee of Citizens with Disabilities (ACCD).
- Processes and procedures must ensure accountability for tracking of outcomes.

VEHICLE MODIFICATIONS (for the client going to and from work)

- The client completes a DRES Application/Approval form.
- The client receives a contract letter outlining the vehicle modifications to be covered by DRES.
- Where possible, the client submits two competing cost estimates.
- The client submits a receipt for reimbursement once the chosen supplier has completed the work.

10.5 TAXABLE AMOUNTS

Generally, DRES provided to individuals to cover assistive services and technologies are NOT taxable.

However, those DRES amounts provided directly to individuals under the financial code 07261-02131- 558010 (See 10.2 – Imagis codes) – **Post secondary grants**, as well as any grants provided to individuals which are not assistive services or technologies related to their disabilities, are taxable amounts and T-4A's must be provided to the individuals receiving these funds.

The DRES funding provided under financial code 558010 are for those students who have exceeded their lifetime maximums under Canada Student Loans (CSL), or for those attending Gallaudet College. Under these circumstances, living allowances as well as costs of tuition and books are sometimes provided. These are considered grants under the Canada Revenue Agency, and T-4 A's must be issued. **Students must be made aware of this taxable status when they are approved for this type of funding.**

Payments to employers do not require the issuance of T-4 A's, but the employer is responsible for declaring the amount received from AHRE on their tax return. **Employers should be made aware of this obligation at the time of negotiating funding.**

PROCEDURE:

1. Students who have exceeded their maximums under the CSL may be eligible under DRES for the **same** amounts of funding as provided under CSL. Needs should be assessed according to CSL criteria, and the amount required divided into monthly amounts to cover the training period. (See Section 8.3 for procedures related to Gallaudet). HRE area offices are responsible to ensure that the amounts to be paid and the codes are correct and **all** DRES guidelines are met.
2. Cheques to the individual to cover tuition and books, as well as monthly living allowances will be issued at the local level. T-4A's will be issued through IBM at the end of the fiscal year, based on the code flagged as taxable ie. 07261- 02131- 558010 and Withholding Code 16.

10.6 Maximum Value of Funding

Under current **regulations**, the maximum expenditures under DRES are as follows:

- Workplace Supports – up to 50% of the modifications, not to exceed $10,000 per disabled employee, to a maximum of $40,000 per worksite.

Regulated amounts cannot be exceeded.

Under current DRES **policy**, the maximum value of funding is:

- For a person with a disability who is in an approved training program: $75,000 per academic year
- For a person with a disability who is employed, has an employment opportunity or is self-employed: $35,000 per worksite.

Policy maximums may be exceeded with Director approval.

Guidelines for Regional Directors related to DRES expenditures greater than policy maximums.

The following considerations need to be addressed in order to exceed the maximums:

- The client is labour market destined.
- The Client Investment Plan indicates the requirement for supports.
- Consultation has occurred with the educational institution (or the employer) and the client to ascertain that the expenditures are reasonable.
- All other avenues for additional financial supports have been investigated, including the Canada Study Grant for Students with Disabilities (DSG), community agencies, etc.
- Institutions and employers have a duty to accommodate. What contributions are they prepared to accommodate student needs?
- The client is faced with the option of withdrawing from the educational institution (or the workplace) if supports are not provided.
- Are there alternate ways to meet the client's needs?

NOTE: Directors have the option of approving a portion of the over maximum limits or providing conditions under which funding will be approved (e.g. for a one year program only, or for assistive technologies only).

11.0 Request for Review

11.1 Decision Review: Disability Related Employment Supports Review Committee:

Intent

To ensure decisions are fair and equitable, and are supported by legislated or regulated authority.

Authority: Recovery, Administrative Penalties and Appeals Regulation (AR 381/2003) section 9(1)

The Minister shall appoint a review committee consisting of three employees of the government for the purpose of reviewing decisions made under the Employment and Training Benefits for People with Disabilities Regulations.

Jurisdiction

Employment and Training Benefits provided by AHRE to persons with disabilities are regulated under the *Income and Employment Supports Act*. The Director or his delegated authority provides Employment and Training Benefits.

The Disability Related Employment Supports Review Committee (DRESRC) has been established to review employment and training benefit decisions as they relate to DRES. The purpose of the DRESRC is to provide an arms length decision review, to ensure decisions are fair and equitable, and within parameters established by regulations. Decisions of the DRESRC are final.

DRESRC Members

The Minister appoints members of the DRESRC. The members are:

- Alberta Human Resources and Employment, People and Skills Investments Division, Director, Employment and Training Branch (or their designate)
- Alberta Seniors and Community Supports, Income Support for Persons with Disabilities Division, Director, Disability Planning and Support (or their designate)
- Alberta Advanced Education, Learner Assistance, Director, Learner Funding (or their designate)

Alberta Human Resources and Employment, Employment and Training Branch, Career Services Unit will serve as Secretary to the Appeals Committee.

Term of Office

Members of the Appeals Committee will hold their appointments until such time as their appointments are changed or revoked by the Minister.

General Policy

Eligibility for employment and training benefits are governed by regulations and policy as determined by the Director.

When an AHRE consultant refuses a client funding, the AHRE consultant attempts to resolve the issue by explaining relevant sections of the Act and Regulations, and policies governing the issuance of funding. Efforts should be made to resolve the issues by offering alternative resources or other means, prior to the initiation of a decision review.

All requests for review of a decision to deny funding undergo an Administrative Review at the Regional level. The Administrative Review process allows the supervisor an opportunity to either uphold or overturn the decision at that time.

The results of the Administrative Review are communicated to the client.

If the supervisor upholds the original decision, and the client requests a further review, the DRES Review Committee will hear the Request for Review. The information compiled during the Administrative Review will be used by the DRES Review Committee during their decision making process.

Note: The AHRE 3630 Request for Review of DRES Form is the preferred method to initiate a DRESRC review; however, any form of written request is acceptable.

PROCEDURES:

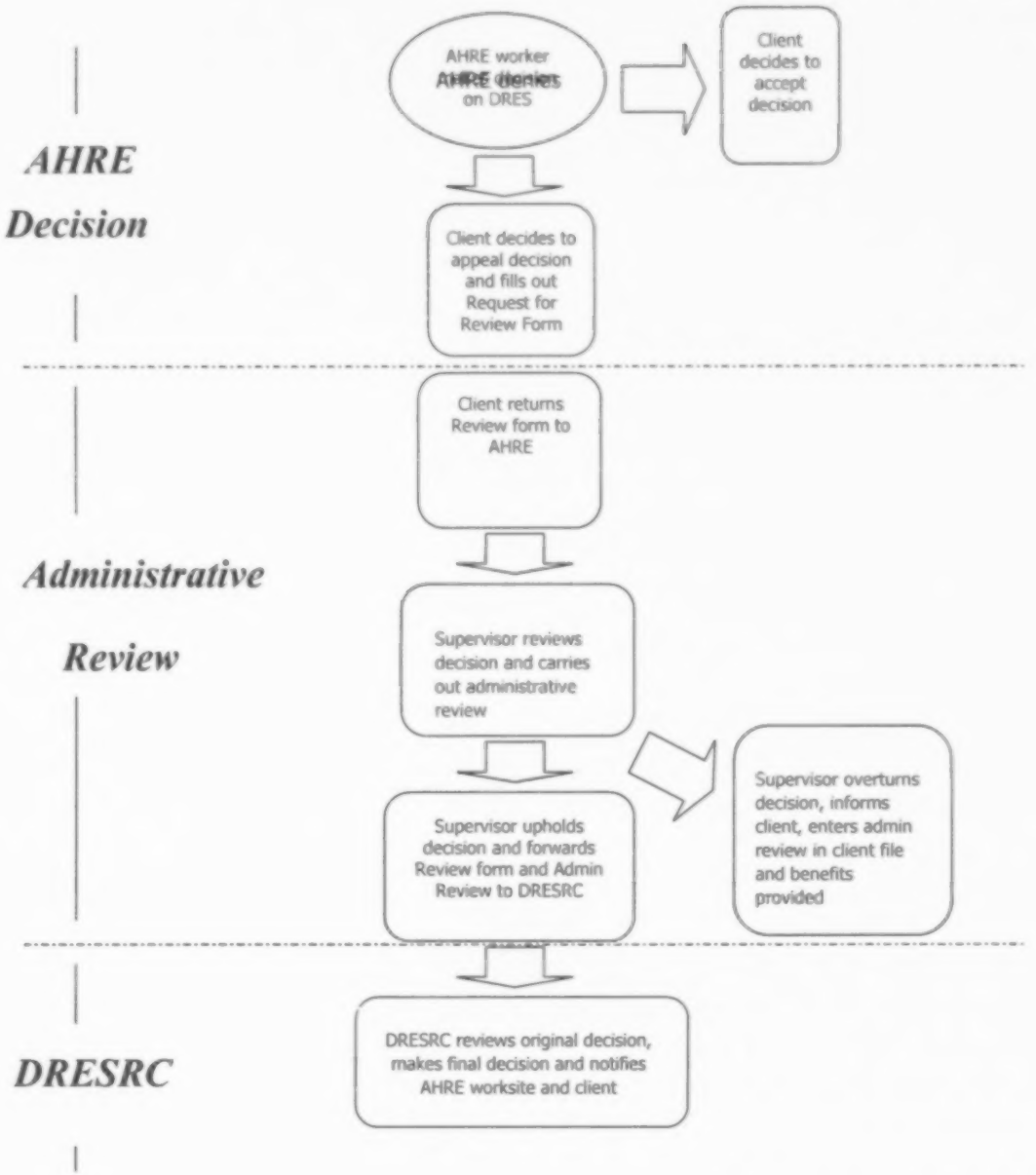
Whenever DRES funding is denied, AHRE must advise the applicant or recipient of the following:

- Their right to appeal the decision and have the decision reviewed by a supervisor and the DRESRC, and
- The review process, and
- The time limit to request a review as stated in policy.

Notification of the right to appeal must be given in writing, at the time of the denial of the funding. A copy of the notification letter or form (AHRE3630) must be retained in the client's file.

A request made by an applicant or recipient to have the decision reviewed must be made in writing within 30 days of the date the applicant or recipient is notified of the decision.

DISABILITY RELATED EMPLOYMENT SUPPORTS REVIEW COMMITTEE (DRESRC) PROCESS


AHRE Decision
AHRE worker AHRE denies on DRES
Client decides to accept decision
Client decides to appeal decision and fills out Request for Review Form
Administrative Review
Client returns Review form to AHRE
Supervisor reviews decision and carries out administrative review
Supervisor upholds decision and forwards Review form and Admin Review to DRESRC
Supervisor overturns decision, informs client, enters admin review in client file and benefits provided
DRESRC
DRESRC reviews original decision, makes final decision and notifies AHRE worksite and client

11.2 Administrative Review

Once an applicant or recipient files a Request for Review due to refusal or termination of funding, or for other reasons affecting their funding, an Administrative Review must be completed. The Administrative Review is completed to prepare both the department and the client for the DRES Review Committee hearing. The Review must clearly outline the case specific reasons for the file closure or decision of ineligibility. This Review will become the basis for the presentation at the DRESRC hearing.

The purpose of the Administrative Review is to ensure that appropriate decisions have been made on the client's behalf, as well as to consider alternatives or resources other than the appeal process. The Review allows the supervisor the opportunity to gather any additional information or special circumstances prior to the appeal hearing.

Decision Reversed

After reviewing the decision made, including discussions with the client or new information presented, the supervisor may reverse the original decision, if policy permits. The supervisor records the decision on the file and informs the client the funding will be granted.

Decision Upheld

If the supervisor upholds the original decision, the supervisor informs the client in writing of the decision, with the rationale for the decision. The client must be informed of their right to appeal to the DRES Review Committee, at the time of the denial of the funding. A copy of the notification letter or form must be retained in the client's file.

A request made by the client to have the decision reviewed by the DRES Review Committee must be made in writing by the client to the Supervisor's attention within 30 days of the date the client is notified of the decision made under the Administrative Review.

The supervisor forwards the Administrative Review package (including all documentation submitted by the client, vendors, benefit administrator and medical practitioners) as soon as possible to the DRESRC.

DRESRC Administrative Review Package

The supervisor ensures all relevant information concerning the client's situation and the department's position is documented in the Administrative Review package. The supervisor sends a copy of the package to the client, to ensure adequate and appropriate disclosure of all information submitted to the DRESRC.

The package contains:

- Copy of the AHRE 3630 Request for Review Form

- Copy of the letter sent to the client outlining the rationale for the decision
- All documents/correspondence regarding the matter submitted by the client, and
- Other supplemental information the supervisor considers necessary.

The department has sole responsibility to determine what documentation is provided. Documentation should present a fair and complete summary of the circumstances.

The package should be sent to:

Disability Related Employment Supports Review Committee
Manager, Career Services Unit
Program Services Branch
People and Skills Investments Division
14 floor, 10030 107 Street
Edmonton AB T5J 3E4

11.3 DRES Review Committee Decision

On receipt of a DRESRC Administrative Review package, the Manager or designate convenes a meeting of the DRESRC as soon as possible. The DRESRC, in making their decision, reviews all documentation submitted in the DRESRC Administrative Review package, and/or presentation by a representative of the AHRE worksite who may participate in person or may participate by telephone, and/or presentation from the client who may be present, participate by telephone, or be represented by an authorized representative.

DRES funding under review is not issued pending the DRESRC decision.

The DRESRC records their decision, and sends a copy to the AHRE Service Centre and to the client. The format should provide the following information:

- **The Decision** – the ruling made by the DRESRC about the funding decision the client has requested the DRESRC to review. If the DRESRC reverses/varies the department's decision an itemized list of the specific funding awarded to the client is recorded as part of the decision. Any restrictions as to cost, frequency, time limitations, etc. are also recorded as part of the decision.
- **Reasons for Decision** – provides the justification for the decision reached by the DRESRC, and identifies the authority for the decision, for example, the section of the Act, Regulation or Policy on which the decision is based is identified.

The AHRE Service Centre copy is filed in the client's file. The DRESRC mails the Client Copy to the client.

The decision of the Review Committee is final.

12.0 GLOSSARY

Please note that these are definitions as they apply within the context of this document.

Academic Strategist

An educator with specialized knowledge of learning styles, issues and strategies who helps students with learning disabilities develop strategies that focus on the students' strengths and maximizes learning opportunities.

Assistive Listening Device

The term "assistive listening device" (ALD) means an amplification system designed to help people hear better in a variety of difficult listening situations.

In contrast to hearing aids, assistive listening devices consist of separate units: a microphone transmitter and a speaker receiver. The transmitter/ receiver units may be either infra-red or frequency modulated (FM) devices. An assistive listening device permits the user to filter out background noise within an auditorium by focusing the microphone on the speaker.

Assistive Services

Services provided to an individual with a disability to lessen or remove a barrier, and include the services provided by sign language interpreters, interveners, transliterators, student assistants, scribes, academic strategists and tutors. Personal care attendants are not included in this definition.

Assistive Technology

Assistive technology are technical aids and devices involving software products, instruments, equipment or technical systems which are used by individuals with disabilities in order to avoid, equalize, ease or neutralize a disability to enable an individual to complete a task.

Provided to individuals with disabilities to assist them to access and participate in education, training or employment, through addressing barriers created by the disabilities.

Assessment (Standardized)

Assessment is the documentation of individual's abilities with comparison to the demands of structural environment concluding with a determination of required action(s) to improve the abilities.

Barrier

An impediment, physical, systemic or attitudinal, as a result of a disability, that interferes with an individual's ability to prepare for, obtain or maintain gainful employment.

CART Reporting or "Real time Captioning"

The term "computer assisted real time transcription" (CART) is a system in which a stenographer or court reporter using a stenograph machine transfers the words of a speaker by means of a computer to printed words on a screen in real time.

Case Management

Case management is a method of providing services whereby a professional worker assesses the needs of the client, and when appropriate, arranges, co-ordinates, monitors, evaluates, and advocates for a package of multiple services to meet the specific client's needs. It requires the professional worker to develop and maintain a working relationship with the client.

Closed Circuit Captioning

Visual text inserted over video in real time that presents what is being spoken, for the purpose of making the video accessible for the hearing impaired

Competitive Employment

Working for pay as a self-employed contractor or within an acknowledged employer/employee relationship, subject to the Employment Standards Code in which the client receives all applicable funding and protection as an employee.

Disability

The following distinction is made by the World Health Organization, in the context of health experience, between impairment, disability and handicap:

- **Impairment**

  Any loss or abnormality of psychological, physiological or anatomical structure or function.

- **Disability**

  Any restriction or lack (resulting from an impairment) of ability to perform an activity in the manner or within the range considered normal for a human being.

- **Handicap**

  A disadvantage for an individual resulting from a disability that limits or prevents the fulfilment of a role that is normal for that individual.

Education Supports

Education supports assist individuals with disabilities to participate in education or training programs by providing assistive services such as a sign language interpreter, intervener, transliterator, note taker/scribe, student assistance, reader, tutor, academic strategist. They can be provided individually or by institutions under agreements with Regional Management.

Eligible individuals

Eligible individual is the term used to refer to of an individual with a disability who is eligible, as designated in the "Eligibility" section of this manual, for services and supports.

Employability assessment

The process used to assist an individual to:

- Set a feasible employment goal and determine the skills necessary to achieve it.
- Determine the skills necessary for the individual to maintain his or her existing employment.
- Develop a plan to acquire those skills determined as being necessary for the individual to obtain or maintain employment.
- Obtain information about the supports available for individuals with disabilities.
- Determine the modifications that may be necessary to the individual's worksite in order for the individual to gain or maintain employment

Employment

Employment is any work that is paid at minimum wage or above or the equivalent when earnings are not based on an hourly wage. It will involve an employer/employee relationship, subject to the Employment and Labour Standards Code, in which the client receives all applicable funding and protection as an employee.

Employment barrier

See the definition for Barrier above.

Employment supports

Programs, goods and services required by an individual with a disability to lessen or remove the effect of that disability on his/her ability to prepare for, gain or maintain employment based on the individual's reasonable and attainable performance of activities.

Follow Up

Follow up is used for statistical purposes to ascertain whether an individual is employed, maintaining employment or pursuing further education or training, and his/her satisfaction with the programs, services and support received from AHR&E.

Follow-up is used for evaluative and planning purposes to determine if what was intended for the client was achieved.

Gainful employment

Part-time or full-time employment in the competitive labour market as defined by competitive employment, or self-employment, which allows an individual with a disability to be partially or fully self-sufficient.

Handicap

A disadvantage for a given individual, resulting from an impairment or disability, that limits or prevents the fulfilment of a role that is normal, depending on age, sex, social and cultural factors, for that individual.

Intervener

A sign language interpreter for the deaf-blind who uses ASL and physical contact for communication, usually signing on the hands.

Investment Plan

A process of employment goal directed step-by-step planning goals and objectives, which provide the road map to gainful employment.

Job Crisis (vocational crisis)

A situation where an individual with a disability is in jeopardy of losing gainful employment because the disability prevents the individual from performing job responsibilities, and employment supports are required to prevent job loss.

Job Development

Consulting with a client regarding the development of job descriptions and job duties to provide a better fit with a client's abilities and limitations.

Job Maintenance

Programs, goods and services that provide the knowledge, skills and attitudes required to remain employed, as well as the supports necessary to assist the individual with disabilities to keep working.

Job Placement

Job placement begins with an analysis of jobs available in the community. The analysis stresses job requirements, reason for turnovers and access to public transportation. At the same time, the assessment of the individual with a disability indicates interest in employment and ability to perform the tasks required by an identified job. The match between the individual and the job also results in identification of the support services that the individual will need to maintain employment.

Job Search Supports

Job Search Supports are any supports or services needed specifically for the purpose of carrying out a job search.

On the Job Supports

Interventions required by the disability and provided at the work site to stabilize and maintain the client's performance on the job as well as assist in skills upgrading.

Preparing for Employment

Programs, goods and services that provide the knowledge, skills and attitudes required for being ready to work, as well as supports necessary for the individual with disabilities to be able to work.

Reader

Can be either adaptive technology or human services for the purpose of communicating written language to a person with a disability.

Refers to adaptive technology for speech synthesis systems, magnification systems, Braille systems and optical character recognition systems. These systems are used to transform inaccessible printed material into speech or machine-readable form bringing the printed words to a person with visual impairments.

Resident

For the purposes of this manual, any individual with an Alberta address.

Self-Employment

Earning a living by working independently of an employer, either freelance or by running a business.

Sign Language Interpreter

The term "qualified sign language interpreter" or "interpreter" means an interpreter who is able to interpret competently, accurately, and impartially both receptively and expressively, using any specialized terminology necessary for effective communication for a deaf/hard-of-hearing person.

Interpreters will interpret all information in a given situation, including instructor's comments, class discussion, and environmental sounds.

Scribe

A scribe or note taker accompanies a student to class or to exams and writes for the student.

Specialized Assessment Services

An analysis, conducted by a person who has appropriate qualifications, of the physical capabilities, medical, psychological or social condition, vocational aptitudes, or academic qualifications of an individual with a disability:

- To determine what level an individual may reasonably be expected to attain in order to obtain or maintain gainful employment and
- To develop specific strategies that will assist the individual to obtain or maintain gainful employment.

Student assistant

A student assistant helps a student by preparing and assembling materials required to complete academic projects or by accessing services that the student with disabilities may be unable to access.

TTY/TDD

The term TDD (Telecommunication Device for the Deaf) -- also known as TTY (TeleTYpewriter) -- is a device designed to provide visual communication over the telephone lines consisting of a standard computer key board and an acoustic coupler with a visual text display.

Training

Training includes:

- Training which leads to a diploma, certificate, applied degree or degree at a post-secondary institution;
- Training programs licensed under the Private Vocational Schools Act;
- Participation in a transitional vocational program which assists individuals who have a developmental disability make the transition from school to work;
- Other training may be deemed suitable on a case-by-case basis.

Transitional vocational program (TVP)

A program that assists individuals who have a developmental disability make the transition from school to work.

Transliterator

A sign language interpreter who communicates in Sign English as opposed to American Sign Language.

Tutor

An individual who provides a student with individualized instruction in specific academic subjects that supports the classroom curriculum and instruction.

Vehicle Modifications

Adaptive transportation devices and mobility equipment, which offers individuals with disabilities the opportunity to address various transportation and mobility barriers.

Vocational Crisis

A situation where an individual with a disability is in jeopardy of losing gainful employment because the disability prevents the individual from performing job responsibilities, and employment supports are required to prevent job loss.

Work Experience

Time-limited work with a training plan, like Training On the Job [TOJ].

Work Exposure

Unpaid, time-limited individual placement in a community work situation that assists the client in determining the appropriateness and the suitability of a specific job, and to provide opportunities for the client to develop the skills and contacts to obtain and maintain employment.

Workplace Supports

Supports that assist individuals with disabilities to make the transition to the workplace and to stabilize in employment. Workplace supports include worksite modification, vehicle modification, and on the job supports.

Worksite Modifications

Structural alterations made to privately owned or operated buildings on an individual basis that address barriers to employment for an individual with a disability.

13.0 FORMS

- All DRES forms are available through the government Forms website https://extranet.gov.ab.ca/goainternalforms/FormsSearch.asp

- **Consent for the Disclosure of Personal Information (DRES)**

  Form No: HRE3281 Rev Date (yy/mm): 04/09

- **Education or Training Supports Application (DRES)**

  Form No: HRE3628 Rev Date (yy/mm): 04/10

- **Employment Supports Application (DRES)**

  Form No: HRE3629 Rev Date (yy/mm): 04/10

- **Request for Review of Benefits Under Disability Related Employment Supports (DRES)**

  Form No: HRE3630 Rev Date (yy/mm): 04/10